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ABSTRACT

The Illinois Task Force on Declining Enrollments was formed in response to the need for more information about the process of planning and management in the public school system in a period of declining enrollment. The task force had five major purposes: to stimulate greater awareness of the problems and opportunities associated with declining enrollments; to outline some of the major issues and options; to set forth some practical suggestions to local districts; to generate greater planning efforts at the state and local levels; and to develop recommendations for state-level study and action. This report is an edited and integrated version of the reports of the task force subcommitteees on enrollment projections, economic issues, the use of unneeded facilities, school staffing, and the effects of reduced enrollments on instructional programs. Four themes run through the discussion--the need for planning; the importance of community involvement in the planning process; constraints, reductions, and barriers; and the opportunities associated with declining enrollments. (Author/IRT)

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REPORT OF THE ILLINOIS TASK FORCE ON DECLINING ENROLLMENTS IN THE PUBLIC SCHOOLS

Submitted to
State of Illinois
State Board of Education
December, 1975

EA 007 840

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October 31, 1975

Dr. Joseph M. Cronin
State Supt. of Education
Illinois State Board of Education
100 North First Street
Springfield, Illinois 62777

Dear Supt. Cronin and Members of the Board of Education:

Enclosed with this letter of transmittal is the report of the Task Force on Declining Enrolment in Illinois. At your request, I served as the Chairman of this Task Force -- an assignment which I found to be a deeply-rewarding experience.

It is my sincere hope that this report will be an instrument which will serve the planning needs of school districts, their boards of education, their administrators and teachers, and their communities. Illinois has been one of the first states to address, in such detail, the problems and opportunities posed by declining enrolments. I am honored to have been a part of the deliberations which preceded this report.

Included in this report are a number of items which will require the Illinois Office of Education and the State Board of Education to follow-up further with examination and research. Many other points of discussion will need to be examined more closely by local school districts. If there is one central theme running throughout the Task Force Report, it is the importance of far-sighted planning with the broadest possible involvement of the entire community.

The Task Force Report is an edited and integrated version of the reports of task force sub-committees. These sub-committees addressed themselves to enrolment projections, to the economic issues surrounding declining enrolments, to the problems of closing unneeded facilities or converting them to other uses, to school staffing in the face of declining enrolments, and to the effects of reduced enrolments on instructional programs.

The Task Force Report concludes with a summary report intended for wide distribution to schools in Illinois. The summary addresses itself to what I believe are a number of wide-ranging opportunities which declining enrolments offer now and will offer in the near future to Illinois schools. It is my sincere hope that these opportunities will be seized, and that school children in Illinois will benefit.

Sincerely yours,

Howard E. Brown

Howard E. Brown, Chairman
Task Force on Declining Enrolment

HEB/dg

REPORT

OF THE

ILLINOIS TASK FORCE

ON

DECLINING ENROLLMENTS

IN THE

PUBLIC SCHOOLS

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Joseph M. Cronin
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PREFACE

In response to the need for more information about the process of planning and management in the public school system in a period of declining enrollments, the Illinois Task Force on Declining Enrollments was formed in the spring of 1975.

The Task Force began its work when its members along with eight special advisors and ten staff members of the Illinois Office of Education assembled in Springfield in early May, 1975, for its first of four meetings.

Drawing on the charge presented to the Task Force at this meeting by the State Superintendent of Education, Dr. Joseph M. Cronin, the group identified the following as its major purposes: 1) to stimulate greater awareness of the problems and opportunities associated with declining enrollments; 2) to outline some of the major issues and options; 3) to set forth some practical suggestions to local districts; 4) to generate greater planning efforts at the state and local levels; and 5) to develop recommendations for state-level study and action.

Following the first meeting, the Task Force was structured into five committees each dealing with a major aspect of declining enrollments. The reports of these committees - projections, economics, facilities, staffing and programs - have become the basis for the five chapters in this report.

The products of the efforts of the Task Force members, the special advisors and the Illinois Office of Education staff are this publication, an edited and integrated version of the reports of each committee; a short summary report for wide distribution; and a report to the State Superintendent of Education and State Board of Education on the Task Force's findings and recommendations.

Most of the Task Force members are school superintendents. Their districts range in size from large suburban and middle sized urban areas to small town/rural areas; and in location from northern to southern Illinois. Others associated with the Task Force as members or special advisors come from the state universities, the public school teaching profession, or state agencies. The IOE staff persons assigned to the Task Force have backgrounds in a variety of educational fields.

Four themes run through the discussion in this report. The first is the need for planning - planning that is data-oriented and systematic; planning that tries to anticipate the possible alternative situations a district might face in both the short run and the long run. The basic planning data are projected enrollments. The number of live

births is, of course, the major factor used in predicting public school enrollment trends, but other variables - private school enrollments, the drop-out rate and patterns of migration - also have an impact on enrollments at both the state and local levels. Despite the fact that long-range enrollment projecting is difficult to do at the local level, a careful effort to make projections - and with experience, to revise them - is better than to make no effort at all. The character of the community and its sub-areas and their possible alternative futures need careful study, and school people will find data and people in the community that will help them make some judgments about future trends in community characteristics and school enrollment. The chapter on enrollments and community characteristic projections provides guidance along these lines.

When enrollment has decreased sufficiently, the issue of closing school buildings as an economy move is likely to arise. A district has the alternative of partly using or of selling or leasing an entire building. Leasing should certainly be the choice if there is any reason to believe that the facility might in five or ten years be needed again for public educational purposes. The issues surrounding the closing of a school are discussed in the facilities chapter.

A second theme running throughout this report is the importance of community involvement in the planning process because the impact of enrollment decline affects so many - pupils, teachers, administrators, parents and other groups. Widespread community involvement seems particularly important in the process of deciding on alternative uses of school buildings.

Constraints, reductions, barriers - these constitute the report's third major theme. Declining enrollments threaten to reduce the variety of programs a district can provide. Decline has reduced the demand for teachers and has led to a search for ways to reduce effectively and humanely the teacher surplus (i.e., reductions in force, early retirement, alternative employment and a lessening of teacher college graduates in oversupplied fields.) The staffing chapter deals with these and other personnel issues.

The single most obvious constraining factor is money. Fiscal issues are strongly related to program and staffing issues. The chapter which deals with school finance discusses a core problem associated with declining enrollments: the loss of state aid without an accompany decline in expenses. This problem is made more difficult by an inflationary economy and the constraints on tapping more tax dollars from state and local sources.

Countering the theme of constraint is the fourth theme: the opportunities associated with declining enrollments. Fewer pupils provide opportunities to reduce average class size. Surplus space provides the opportunities to improve programs, to develop new ones and to bring closer the schools and the community by bringing into school facilities any of a number of social and public service functions. The chapter on programs elaborates on the opportunities provided by fewer pupils and surplus space.

Some have observed that it takes a different kind of skill - probably a higher level of skill - to manage a declining situation than to manage an expanding one. For example, carrying out some reasonably orderly process of reduction in the teaching and administrative staff is potentially a much more complex operation than expanding the staff.

Clearly there is a need for training in the planning and management of decline for the various segments of the educational community, notably administrators, board members, teachers and parents. Reflecting this need are the recommendations found in various sections of this report for in-service workshops, conferences, case studies, data-gathering and reporting, and technical assistance. The Illinois Office of Education clearly has a resource role in assisting local districts as they face the problems and opportunities associated with decline. School people will find a useful source of information in the reports, articles, etc., listed in the bibliography.

No one can pretend that the management of school districts in a period of declining enrollments can be handled without risks, conflicts in self and group interest, difficult trade-off decisions, and the complexities in dealing with a number of variables.

Over time, however, school people should develop greater capability in planning and public involvement and in handling the problems and identifying the opportunities associated with enrollment decline.

This report of the Illinois Task Force on Declining Enrollments is intended to contribute to the development of these capabilities.

SUMMARY OF THE RECOMMENDATIONS OF THE TASK FORCE ON DECLINING ENROLLMENTS

Fiscal

1. For a specified period of time general state aid should be made less immediately responsive to changes in pupil numbers. As general state aid represents the largest proportion of state aid, the State Board of Education should seek the passage of legislation which would slow the rate of loss of claimable pupils. Alternatives that should be considered include the following:

   a) For a specified period following the beginning of the enrollment decline, allow a district to count one-half of the best six months ADA of claimable pupils lost from one year to the next. The approach allows the district a period of time to adjust to a new level of efficient operation.

   b) For a specified period of time allow school districts to use the highest of the best six month ADA figure for <u>any of the last three years</u>. Presently, districts may select the best six months ADA of the year just completed or the year prior.

2. The Illinois Office of Education should provide technical assistance in school management, focusing upon cost saving techniques and upon how to plan and budget for declining enrollment.

3. The Illinois Office of Education should undertake an in-depth investigation of variable and fixed costs in elementary and secondary education. Two products of such an investigation should be (1) a model to project revenue and expenditures by major category; and (2) an investigation of economies of scale determining optimal size for minimizing cost in the short and in the long run.

4. The Illinois Office of Education should conduct a study of the impact of enrollment decline upon local voter support for bond and tax referenda.

Facility Closing

1. The Illinois Office of Education should establish a Resource Center on Declining Enrollments. A major function of this Center would be to maintain a computerized data bank to inventory vacant classrooms and school buildings throughout the state. This Center should serve as coordinator between the potential users of school space (e.g., state agencies and community organizations) and school districts, so that potential users could contact only one source to get statewide information regarding school vacancies. In addition, this Center could assist local districts with legal concerns relating to closings and the sale of buildings.

2. The Illinois Office of Education should develop the capability to provide technical assistance to school districts on matters of community relations in the process of school closing, notably under stress situations such as community opposition to facility closing.

Staffing

1. In order to promote high quality programs and teacher supply/demand balance, several studies should be undertaken by the joint committee of the Illinois Board of Education and the Illinois Board of Higher Education.

   a) A study to determine the feasibility and desirability of a requirement that each public teacher training institution submit a five year plan on how it intends to adjust the number of students in its programs to lessen the general oversupply of teachers, or if it does not expect such adjustments, to give the reasons why.

   b) A study of the feasibility and desirability of a five year course of study as a requirement for certification in Illinois.

2. The Board of Education should sponsor a statewide or several regional study committees to discuss all of the issues surrounding the retraining of teachers.

3. The Board of Education should sponsor a conference, to be planned jointly with university people, school administrators and teachers to bring together with these school groups major public and private employers in the state to assess alternative employment opportunities and the feasibility of a clearinghouse at the state level to help find jobs for teachers.

4. The State Board of Education should sponsor a committee representative of the major school interest groups in the state to appraise the desirability of maintaining or changing the "60-day rules" in the Illinois School Code.

5. The Task Force on Declining Enrollments endorses the position of the Board of Trustees of the Illinois Teachers' Retirement System supporting legislation providing for retirement at age 55 or after without discount with 20 or more years of credited service.

6. The Office of Education should conduct a study to find out what has happened occupationally to teachers who have left the profession.

7. To aid local districts experiencing declining enrollments in staffing studies, the Illinois Office of Education should provide the following kinds of assistance to local districts as they project their staffing needs--booklets, consultants and training.

8. The Office of Education should examine a representative sample of districts experiencing declining enrollments and disseminate throughout the state the various school board practices and negotiated contract provisions on personnel and the experiences associated with the implementations of these policies.

9. There should be a state-sponsored administrative staff study to provide criteria to determine whether the administrative staff is off balance or not, and to recommend administrative staffing patterns based on district and attendance area enrollment and other factors.

10. Because of the time and cost and the increasing resort to the courts associated with efforts to dismiss a tenured teacher, some vehicle should be developed for due process training for superintendents, board members and teachers. The associations representing these groups should consider conducting such training.

11. While the Task Force does not support a quota system as a means of controlling supply and demand in teacher education, the Task Force does support the idea that each institution of higher education should be expected to review its own standards of admissions and retention with a view to greater quality control.

12. Students entering or considering state college and university teacher preparation programs should be provided with the best current information on teacher supply and demand.

Enrollment Projection

1. The Illinois Office of Education should continue to monitor enrollment trends on an annual basis, using the latest birth statistics and other information each year to improve enrollment forecasts and to extend them farther into the future.

2. So that the Illinois Office of Education can have the best possible data available for making enrollment forecasts, the Illinois Office of Education should impress upon local superintendents the need for very accurate statistics. For districts with ungraded classes, it is essential that the local superintendent identify the number of students who would otherwise fall in each grade level or at least prepare a distribution of students by age. Use of the survival or retention ratio methods of projecting enrollments requires such information.

3. The Illinois Office of Education should investigate the feasibility of collecting and analyzing data on student migrations in and out of local school districts and in and out of state.

4. The Illinois Office of Education should encourage regional superintendents of schools and local district superintendents to take an active role in enrollment projecting and planning. The Task Force recommends that regional superintendents should be responsible for making data available and coordinating the work of local districts.

5. The Illinois Office of Education should seek funds for the purpose of making personnel available to assist local districts in preparing enrollment forecasts and in planning in accordance with those forecasts.

School Programs

1. All proposed educational requirements placed before the legislature should be evaluated in light of declining public school enrollments.

2. The Illinois Office of Education should establish training programs and provide information which will assist school administrators and teachers in dealing effectively with the management of school programs in a period of decline.

3. The Illinois Office of Education should develop funding sources which would be allocated to mid-range and long-range program planning activities - activities made possible by declining enrollments - in such fields as health education; education of the exceptional child (i.e., gifted children, mentally and physically handicapped); and environmental education in the areas of energy and material resources.

CHAPTER I

ILLINOIS ELEMENTARY AND SECONDARY SCHOOL ENROLLMENTS: PAST, PRESENT AND FUTURE

INTRODUCTION

After World War II Illinois public school enrollment increased for 27 consecutive years, reaching a peak of 2,373,659 during the 1971-72 school year.[1] In fact, the record high enrollment in 1971-72 represents a 113 percent increase over the 1945-46 enrollment of 1,115,707.[2] This long and steep climb in Illinois public school enrollment paralleled the nationwide trend of increasing elementary and secondary enrollments throughout the 1950's and 1960's.

Since the peak year of 1971-72, enrollment in Illinois public schools has consistently declined. By 1974-75, total kindergarten through twelfth grade enrollment had declined 3.9 percent from the record high of 1971-72. The recent drop in Illinois public school enrollment parallels a similar decline at the national level.[3]

As a result of the statewide decline in kindergarten through 12th grade enrollment from 1971-72 through 1974-75, these four important questions were considered by the Task Force:

(1) What factors produced this recent decline in Illinois elementary/secondary enrollment?

(2) How long will the enrollment decline continue?

(3) How great is the decline likely to be?

(4) How can individual school districts develop reasonable projections of their own future enrollment trends?

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[1]The 1971-72 enrollment is taken from the 1971-72 Illinois Public School Fall Enrollment and Teacher Statistics publication. There were also 6,206 pre-kindergarten pupils and 117 secondary post graduates who are not included in the 2,373,659 enrollment figures.

[2]The 1945-46 Illinois public school enrollment is an "end of the year" enrollment taken from the 46th Biennial Report of the Superintendent of Public Instruction. The 1,115,707 is "net" enrollment because the end of the year "total" enrollment for 1945-46 included duplicate counts of 43,457 inter-district transfer students.

[3]Kenneth A. Simon and Martin M. Frankel, Projections of Educational Statistics to 1983-84, 1974 Edition (National Center for Education Statistics).

This chapter focuses upon topics which attempt to answer these important questions. These topics are presented below in outline form.

Factors Affecting Illinois Elementary and Secondary School Enrollment

A. Number of Illinois Resident Live Births
B. Illinois Population Migration In- and Out-of-State
C. Illinois Public/Nonpublic School Enrollment Ratios
D. Student Dropout Rate
E. Other Factors

Projections of Illinois Elementary and Secondary School Enrollments

A. Introduction
B. Projections of Public School Enrollment
C. Projections of Nonpublic School Enrollment

Enrollments at the Local Level

A. Introduction
B. Projecting School Enrollment at the Local Level
C. Warning Signals for Changes in Enrollment Trends
D. Sources for Assistance in Projecting Enrollment

Summary

Recommendations for State Level Action and Study

Addendum: Tables and Instructions to Project First Grade Enrollment, the Retention Ratios, and Enrollments for All Grades

FACTORS AFFECTING ILLINOIS ELEMENTARY AND SECONDARY SCHOOL ENROLLMENTS

There are four factors which exert a significant effect upon Illinois public school enrollment at the local district, county, and state levels. They are the number of live births, migration patterns, nonpublic school enrollment and dropout rates. While the discussion in this section of the chapter will focus upon the statewide picture, many counties and districts exhibit similar trends. School district personnel, therefore, may use statewide information as a frame of reference to compare with their own enrollment situation.

Illinois Resident Live Births

The "baby boom" following World War II and throughout the 1950's resulted in accelerated school enrollments during the 1950's and 1960's. Likewise, the basic reason for the recent decline in overall enrollment is the general decline in the annual number of Illinois live births during the 1960's and 1970's. Table I shows the changes in the annual number of Illinois resident live births. The crucial year displayed in this table is 1959, when the number of Illinois live births reached a record high of 239,871. The 1959 peak was the culmination of consistent annual increase since World War II. There have been consistant annual

TABLE I

ANNUAL NUMBER OF ILLINOIS RESIDENT LIVE BIRTHS*

Year	Number of Live Births	Index of Live Births (1959=100)
1946	174,825	72.8
1947	196,007	81.7
1948	184,871	77.1
1949	189,313	78.9
1950	189,640	79.1
1951	201,032	83.8
1952	205,438	85.6
1953	206,813	86.2
1954	217,229	90.6
1955	220,541	91.9
1956	229,571	95.7
1957	238,579	99.5
1958	234,712	97.8
1959	239,871	100.0
1960	238,760	99.5
1961	237,051	98.8
1962	230,484	96.1
1963	224,787	93.7
1964	222,259	92.7
1965	208,063	86.6
1966	201,284	83.9
1967	195,644	81.6
1968	193,261	80.6
1969	195,699	81.5
1970	205,203	85.5
1971	195,311	81.4
1972	177,848	74.1
1973	168,992	70.5
1974	168,991	70.5

* These data on the annual number of live births was provided by Clyde Bridger, Chief Statistician, Illinois Department of Public Health, State Center for Health Statistics, Springfield, Illinois.

reductions in the number of Illinois live births since 1959, with only two years (1969 and 1970) showing exceptions to this downward trend. During this 15 year span there has been a substantial 29.5 percent drop in the number of Illinois live births to a low of 168,991 in 1974.

Table II presents three sets of projections of the annual number of Illinois live births for the years 1975 through 1980. The basis for these projections is the population of females, ages 15 through 44 years. The projected female population is multiplied by projected fertility rates to obtain projected numbers of live births. The fertility rate is the number of live births per 1,000 females, ages 15 through 44 years, for a given year.

The three fertility rate models all assume the same fertility rate of 68.5 for 1975 but assume different fertility rates from 1976 through 1980. These three models are: decreasing, constant and increasing fertility rates. The decreasing fertility rate model incorporates an annual decline in the fertility rate of 0.4 from 1976 through 1980, thereby generating a total of 1,064,900 live births from 1975 through 1980. The constant rate model projects the same 68.5 births per 1,000 females (ages 15-44 years) each year through 1980, thereby generating 1,080,900 live births from 1975 to 1980. The increasing fertility rate model projects an annual increase in the birth rate of 0.4 each year, generating a total of 1,096,900 live births from 1975 to 1980.

It is noteworthy that all three models project an annual increase in the number of Illinois resident live births beginning in 1975. This is because the number of child bearing age females is projected to increase at an annual rate of 50,000 from 1975 through 1980. If any of these three projections of live births prove to be reasonably accurate and if other influential factors remain relatively unchanged, Illinois public school kindergarten and first grade enrollments should begin a steady gradual increase beginning in the 1980-81 and 1981-82 school years, respectively. (See Table IV, page 10)

Illinois Population Migration In- and Out-of-State

From 1960 to 1970 there was a net out-of-state migration of 28,117 persons, or less than 0.3 percent of the total Illinois population.[4] When converted to an average annual basis, this net out-of-state migration is insignificantly small. For practical purposes, therefore, the decade of the 1960's can be viewed as a period of zero net migration for the State of Illinois as a whole. Although corresponding migration information is not yet available for the decade of the 1970's, the U. S.

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[4]Clyde Bridger. Components of Illinois Net Migration: 1960-1970, Unpublished Report, Illinois Department of Public Health, Springfield, Illinois.

TABLE II

THREE PROJECTIONS OF THE ANNUAL NUMBER OF ILLINOIS RESIDENT LIVE BIRTHS*

Year	Number of females: Ages 15-44 years	Decreasing Model I		Constant Model II		Increasing Model III	
		Rate**	Live Births	Rate**	Live Births	Rate**	Live Births
1974	2,458,000	68.8	168,991	68.8	168,991	68.8	168,991
1975	2,505,000	68.5	171,600	68.5	171,600	68.5	171,600
1976	2,555,000	68.1	174,000	68.5	175,000	68.9	176,000
1977	2,605,000	67.7	176,400	68.5	178,900	69.3	180,500
1978	2,655,000	67.3	178,700	68.5	181,900	69.7	185,000
1979	2,705,000	66.9	181,000	68.5	185,300	70.1	189,600
1980	2,755,000	66.5	183,200	68.5	188,700	70.5	194,200

*All information presented in this table was prepared by Clyde Bridger, Chief Statistician, Illinois Department of Public Health, State Center for Health Statistics, Springfield, Illinois.

**The rate of 68.8 live births per 1,000 females ages 15 through 44 years observed in 1974 is assumed to drop to 68.5 in 1975 and then drop 0.4 per year through 1980 in the decreasing Model I. The value of 68.5 chosen for 1975 is assumed to remain unchanged in the constant Model II and to increase 0.4 per year through 1980 in the increasing Model III.

Bureau of the Census and the Illinois Department of Public Health estimate that the State of Illinois experienced a net out-of-state migration of 289,000 during the four year period from April 1, 1970 to June 30, 1974.[5] This represents an overall loss for Illinois population of 2.6 percent and an average annual loss of about 0.6 percent. While the degree of net out-of-state migration from 1970 through 1974 is relatively small, it nevertheless appears to have contributed to the 1972-73, 1973-74, and 1974-75 Illinois public school enrollment decline.

Illinois Public/Nonpublic School Enrollment Ratios

A third factor influencing public school enrollment is nonpublic school enrollment. Although pupil transfer to nonpublic schools may help explain public school enrollment decreases in some school districts, the overall percentage as well as number of Illinois school age children in nonpublic schools has consistently declined during the past ten years.

The enrollments and enrollment ratios of Illinois public and nonpublic schools are shown in Appendix A for the school years 1965-66 through 1974-75. A summary of Appendix A follows.

The proportion of students enrolled in public elementary schools increased from 75.7 percent (1965-66) to 84.2 percent (1974-75) while the proportion attending nonpublic schools decreased from 24.3 percent to 15.8 percent. At the high school level the same trends are evident. The proportion of total public school students increased from 78.7 percent (1965-66) to 86.0 percent (1974-75) and the percentage of nonpublic school students dropped from 21.3 percent to 14.0 percent. However, it is noteworthy that since 1971-72 the rates of decline have slowed with respect to the percentage of elementary and high school students enrolled in nonpublic schools. In fact, the percentage of high school students enrolled in nonpublic schools remained the same for the 1973-74 and 1974-75 school years, which is the only instance of no decline since the initial collection of nonpublic school enrollment information in 1965-66.

The pattern of public/nonpublic enrollment ratios is somewhat different for kindergarten pupils. From 1965-66 through 1970-71, the percentage of pupils enrolled in public school kindergartens consistently increased from 90.2 percent to 94.2 percent. Since 1971-72, however, this percentage has declined slightly each year to 92.8 percent in 1974-75 while the proportion attending nonpublic school kindergartens has gradually increased from 5.8 percent to 7.2 percent during the same time period.

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[5]United States Department of Commerce, Social and Economic Statistic Administration, Bureau of the Census, Estimates of the Population of Illinois Counties and Metropolitan Area: July 1, 1973 and 1974. (Current Population Reports Federal-State Cooperating Program for Population Estimates. Series P-26, No. 128).

1974-75 nonpublic school enrollment data reveals that about 84 percent of these students are enrolled in Roman Catholic elementary and secondary schools and the majority (58.2 percent) of the nonpublic students attend schools of the Chicago Archdiocese (Cook and Lake Counties). The enrollments and number of schools for each of the six Roman Catholic Dioceses in Illinois are presented in Table III.

In summary, for the state as a whole, the decline in Illinois public school enrollment since the 1971-72 school year cannot be attributed to a net loss in students to Illinois nonpublic schools. However, though data are not available, it may be that a very small part of the decline in public school enrollment results from the possible loss of students to small, nonreporting independent schools and of severely handicapped youth to private special education agencies.

Student Dropout Rate

During the four year period (1970-71 through 1973-74), there had been a gradual consistent increase in the dropout rate, the number of Illinois public high school students who drop out during the school year in relation to the total high school enrollment at the beginning of the school year. The high school dropout rates for each of these four school years are as follows: 1970-71 (5.8 percent), 1971-72 (6.0 percent), 1972-73 (6.2 percent), and 1973-74 (6.6 percent). A total number of 46.402 high school students were reported as dropouts during the 1973-74 school year. This increase in the dropout rate among high school students has had a small but noticeable depressant effect upon Illinois public high school enrollments during the 1970's.

While the recent gradual upward trend could continue among high school students, it is also possible that the current (1974-1975) high rate of unemployment may "encourage" some potential dropouts to remain in school* Expanded vocational programs and the creation of alternative programs could also reverse this small upward trend in the high school dropout rate.

Other Factors

While there are other factors which could potentially affect school enrollment, such factors have not contributed to the current decline in Illinois public school enrollment. Since 1960 the death rate for children under age 5 has steadily declined from 611.0 to 419.6 per 100,000 population in 1974. Likewise during the same 14 year span the death rate among 5 to 14 year age youth has decreased slightly from 43.9 to 38.0 per 100,000 population. There is the potential for sudden and significant change in both public and nonpublic school enrollment through the enactment of state and federal laws. For example, Illinois elementary public school enrollment would be instantaneously increased by about 325,000 if legislation were enacted mandating school attendance for children of prekindergarten age (3 and 4 years). Also the enactment of constitutional laws providing state financial aid to parochial schools could further reduce enrollment in Illinois public schools but reverse or stabilize the declining enrollment among nonpublic schools.

*Since the completion of the work of the Task Force, 1974-75 data became available. The drop-out rate during the 1974-75 school year was 5.8 percent, a clear reversal of the recent trend.

TABLE III

NUMBER AND ENROLLMENT OF SCHOOLS IN ILLINOIS' SIX CATHOLIC (ARCH)DIOCESES: 1974-75*

(Arch)Dioceses	Elementary Schools		High Schools		All Schools	
	Number	Enrollment	Number	Enrollment	Number	Enrollment
Chicago	402	153,781	76	62,717	478	216,498
Joliet	68	19,325	9	6,414	77	25,739
Springfield	63	15,646	10	4,434	73	20,080
Peoria	60	14,459	9	4,332	69	18,791
Rockford	49	13,367	8	4,689	57	18,056
Belleville	57	10,888	4	2,132	61	13,020
Total Catholic	699	227,466	116	84,718	815	312,184
Total Nonpublic**	---	274,279	---	97,923	1,227	372,202

*The information for Catholic Schools was taken from the 1975 edition of the Official Catholic Directory (published by P.J. Kenedy and Sons, New York).

**Fall Pupil Enrollment and Teacher Statistics of Independent, Parochial, and Private Schools: 1974-75, Circular Series A, Number 342 (issued by the Department of Budget and Statistics, Illinois Office of Education, Springfield, Illinois).

PROJECTIONS OF ILLINOIS ELEMENTARY AND SECONDARY SCHOOL ENROLLMENTS

Introduction

This section will present and describe projections of elementary and high school enrollment in Illinois public schools for the 10 year period 1975-76 through 1985-86. These projections are based upon the relationship between Illinois public school enrollment in given years and the number of Illinois live births in preceding years. For example, projections of future kindergarten enrollment are based upon the relationship between past kindergarten enrollments and the corresponding number of infants born five years earlier. Projections of elementary (grades 1-8) enrollment are based upon the relationship of past enrollments with the corresponding number of accumulated live births 6-13 years earlier. Likewise projected high school enrollments are based upon the relationship between past enrollments and the corresponding number of accumulated live births 14-17 years earlier. These projections, presented in Table IV, are based on the constant fertility rate of 68.5 for each year, 1975 through 1980 (see Table II, page 5). A discussion of the methods used in developing these projections is presented in Appendix B. Since enrollment projections are predictions concerning the future, they should be treated only as useful guidelines for planning. Only if the 1971-75 trends in net out-of-state migration, dropout rates and the public/nonpublic enrollment ratio continue relatively unchanged, and only if the constant fertility rate model projection of 68.5 actually occurs, will these projections of Illinois public school enrollments prove to be relatively accurate.

Projections of Public School Enrollment

Projected Total Elementary Enrollment: Grades K-8

Table IV shows past Illinois Public School elementary (K-8) enrollments from 1970-71 through 1974-75 and projected enrollments from the 1975-76 through the 1985-86 school year. The total elementary enrollment reached its highest level of 1,684,132 pupils in the 1970-71 school year. Since 1970-71 the elementary enrollment has consistently decreased and a continued annual decline is projected until the 1985-86 school year. In the fall of 1985 elementary enrollment is expected to reach its lowest level of approximately 1,294,000 pupils. This represents a reduction of about 386,000 pupils or nearly 23 percent from the high in 1970-71.

The projected elementary enrollment throughout the 1980's will be increasingly influenced each year by live birth projections of children who have not yet been born. Elementary enrollment projections during the 1980's, therefore, should be treated with a degree of skepticism. If, for example, the declining trend in the number of Illinois resident live births from 1959 through 1974 is reversed in 1975, as predicted, and if there is an increasing number from 1975 onward, then the decline in elementary public school enrollment should "bottom out" during the mid 1980's and a gradual increase should follow throughout the latter half of the 1980's.

TABLE IV

ILLINOIS FALL PUBLIC SCHOOL ENROLLMENT PROJECTIONS *

School Year	Kindergarten	Elementary (K-8) Enrollment	Secondary Enrollment	Total Enrollment	% Change from Peak Year: 1971-72
1970-71	181,111	1,684,132	668,654	2,352,786	
1971-72	175,141	1,678,517	695,142	2,373,659	
1972-73	166,790	1,643,486	704,035	2,347,521	-1.1%
1973-74	162,690	1,600,486	711,311	2,311,797	-2.6%
1974-75	164,285	1,562,719	719,170	2,281,889	-3.9%
		P R O J E C T I O N S			
1975-76	171,345	1,534,721	722,247	2,256,968	-4.9%
1976-77	162,108	1,503,842	719,034	2,222,876	-6.4%
1977-78	147,614	1,464,114	707,571	2,171,685	-8.5%
1978-79	140,263	1,418,744	695,031	2,113,775	-10.9%
1979-80	140,263	1,385,296	673,002	2,058,298	-13.3%
1980-81	142,428	1,359,815	650,812	2,010,627	-15.3%
1981-82	145,250	1,342,053	628,665	1,970,718	-17.0%
1982-83	148,072	1,329,243	606,628	1,935,871	-18.4%
1983-84	150,977	1,317,338	597,232	1,914,570	-19.3%
1984-85	153,799	1,300,211	600,210	1,900,421	-19.9%
1985-86	156,621	1,294,463	599,957	1,894,420	-20.2%

*See Appendix B for a discussion of the methodology and assumptions upon which these projections were made.

Projected Total High School Enrollment: Grades 9-12

The actual Illinois public high school enrollments for 1970-71 through 1974-75 and the projected enrollments for 1975-76 through 1985-86 are also presented in Table IV. In contrast with the four year decline in elementary enrollment, the statewide high school enrollment is expected to continue to increase and reach a peak during the 1975-76 school year. Beginning with the 1976-77 school year, however, the total high school enrollment is expected to start a decline extending into the 1990's. By the fall of 1985, a reduction of about 122,000 from the 1975-76 projected peak enrollment of 722,000 is anticipated. The figure represents approximately a 17 percent decline in high school enrollment during the ten year period from 1975-76 to 1985-86. Based upon the number of children already born, it is projected that by the 1989-90 school year total high school enrollment will approximate 522,000, a decrease of about 200,000 or 28 percent, from the 1975-76 peak.

If in 1975 or shortly thereafter, the number of Illinois live births begins a steady annual increase, public high school enrollments will likewise begin a gradual increase during the 1990's.

Projected Total Enrollment: Grades K-12

Illinois public school total enrollments for the years 1970-71 through 1974-75 and the projected enrollments for 1975-76 through 1985-86 are also shown in Table IV. Public school total enrollment reached a record high of 2,373,659 in the fall of 1971, declined 1.1 percent in 1972-73, and is expected to continue decreasing through the 1985-86 school year. This reduction is expected to approximate 476,000 and represent a 20 percent decrease in total enrollment during this fourteen year span. Enrollment is projected to increase gradually during the latter part of the 1980's if the number of Illinois live births begins an upward trend soon.

Projections of Nonpublic School Enrollment

The reporting and collection of nonpublic school enrollment information is not as complete as for public schools - especially prior to 1971-72. This incompleteness is the major reason for not undertaking statewide nonpublic school enrollment projections. However, enrollment projections are presented for the Chicago Catholic Archdioceses as an illustration of likely trends for nonpublic schools in general. Nonpublic school enrollments are affected by two major factors: private school costs and parental attitudes. These factors are briefly examined in the following paragraphs.

Tuition and fund-raising activities are the primary sources of financial support for nonpublic schools. As the level of tuition increases, some parents will decide not to enroll their children in private schools. The consistent decline in the ratio of nonpublic to public school students during the past ten years strongly suggests that the upper limit of tuition and donations has been exceeded for many parents and schools. Therefore, it seems reasonable to predict that if the inflationary rate of the 1970-75 period continues, and increased financial aid is not forthcoming, there will continue to be fewer nonpublic schools and fewer students attending such schools.

The attitudes and values of parents also affect nonpublic school enrollment. If more parents want their child's schooling to provide for the development of religious values, then parochial school enrollments are likely to increase. On the other hand some parents believe that religious education can be taught effectively outside of school, and they may enroll their children in public schools and the children will attend religious education classes on a part-time basis. While supporting data are not available, some parents may elect to enroll their children in private schools in an attempt to avoid racially integrated public schools or to avoid conditions (e.g., busing) associated with racially integrated public schools. It is also possible that some parents may have their children attend private schools because they perceive that such schools provide greater prestige, a higher quality education and/or a more disciplined atmosphere. Because of the variability in fiscal conditions and the extreme difficulty in assessing future trends in parental attitudes and values, the enrollment projections in Table V for the schools of the Chicago Roman Catholic Archdiocese are presented solely as broad guidelines to facilitate planning. The reason for presenting these data is that the statewide trend in nonpublic school enrollment is likely to continue to closely follow that of Illinois Roman Catholic schools in general and the Chicago Archdiocese in particular. Table V shows enrollment changes for the Chicago Archdiocese schools from 1969-70 through 1974-75 and projects future enrollment trends through 1984-85.

A study of enrollment trends in kindergarten indicates a tapering off of the decline during recent years. Kindergarten has already experienced the decline in enrollment due to the impact of fewer births. There seems to be a resurgence in opening kindergartens in Roman Catholic schools as a means for introducing children to the Roman Catholic school and thus recruiting for enrollment in the primary grades. Consequently, it would seem reasonable to project that the kindergarten enrollment will not decline in the next two years and possibly will increase by about 2 percent in future years. If other conditions remain constant, one could project a 2 percent increase for each year from 1980-1985.

Elementary school enrollment will diminish because of the decline in the number of live births in the 1960's and 1970's. The elementary schools will probably continue to graduate at least 30 percent more students than they enroll in the first grade, until about 1978-79. This difference should become smaller for the following four years and possibly be eliminated after 1982-83. Inasmuch as there is some effort to increase enrollment (recruitment, kindergarten, etc.) that was not in existence previously, it would seem reasonable to project that the decline will be 6 percent for four years, 3 percent for four years and that there will be stable enrollments in 1983-84 and 1984-85.

High school enrollments for the past six years show a marked decrease in the rate of decline. There is evidence that more and more students who attend Roman Catholic high schools come from public elementary and junior high schools. It would seem that the high school enrollment may remain stable for about three years, then drop by 3 percent with the impact of the decline in live births and then decrease by 6 percent a year for four years. High school enrollment should level off temporarily during the mid 1980's before continuing to decline during the latter 1980's.

TABLE V

CATHOLIC SCHOOL ENROLLMENT AND PROJECTIONS FOR THE ARCHDIOCESE OF CHICAGO*

School Year	Kindergarten Enrollment	Kindergarten Annual Change	Kindergarten Annual %Change	Elementary Enrollment	Elementary Annual Change	Elementary Annual %Change	High School Enrollment	High School Annual Change	High School Annual %Change
1969-70	7,027			219,350			71,968		
1970-71	6,098	-929	-13.2	203,451	-15,899	-7.2	68,631	-3,337	-4.6
1971-72	5,681	-417	- 6.8	189,406	-14,045	-6.9	66,815	-1,816	-2.6
1972-73	5,941	+293	+ 5.1	176,912	-12,494	-6.5	64,018	-2,797	-4.1
1973-74	5,830	-144	- 2.4	164,273	-12,639	-6.9	62,952	-1,066	1.6
1974-75	5,819	- 11	- 0.1	153,781	-10,492	-6.3	62,714	- 238	-0.3
				P R O J E C T I O N S					
1975-76	5,819	0	0	144,554	- 9,227	-6.0	62,700	- 14	0.0
1976-77	5,819	0	0	135,881	- 8,673	-6.0	62,700	0	0.0
1977-78	5,935	+116	+ 2.0	127,738	- 8,153	-6.0	62,700	0	0.0
1978-79	6,054	+119	+ 2.0	120,064	- 7,664	-6.0	60,819	-1,881	-3.0
1979-80	6,175	+121	+ 2.0	116,462	- 3,602	-3.0	57,170	-3,649	-6.0
1980-81	6,299	+124	+ 2.0	112,968	- 3,494	-3.0	53,740	-3,430	-6.0
1981-82	6,425	+126	+ 2.0	109,579	- 3,389	-3.0	50,516	-3,224	-6.0
1982-83	6,554	+129	+ 2.0	106,292	- 3,287	-3.0	47,485	-3,031	-6.0
1983-84	6,885	+131	+ 2.0	106,292	0	0.0	46,060	-1,425	-3.0
1984-85	7,019	+134	+ 2.0	106,292	0	0.0	45,599	- 461	-1.0

*All of the information presented above was prepared by Reverend James E. Michaletz, School Planning Commission, Archdiocese of Chicago School Board.

ENROLLMENTS AT THE DISTRICT LEVEL

Introduction

Declining statewide public school enrollments in Illinois do not necessarily reflect what is happening at regional or local levels. However, the previous discussion of statewide live births, migration patterns, private school enrollments and dropout rates should provide some insights in thinking about enrollment projections at the regional and local level.

Differences in enrollment trends from locality to locality relate to patterns of a) commercial, industrial, transportation and accompanying residential change and development; b) in and out migration; c) age, racial and socio-economic composition of the population; and d) values, attitudes and life-style preferences of individuals and families in a locality.

Generally enrollments are decreasing in central cities, older suburbs and small town/rural areas, but at varying rates. With the exception of a few downstate counties, enrollments are continuing to increase in only those suburban counties in northeast Illinois adjacent to or near Cook County. However, it should be pointed out that within the same region, one district may be experiencing increasing enrollments and a neighboring district decreasing enrollments. Within a school district, enrollments may be increasing rapidly at some attendance centers while decreasing sharply at others.

However, for most communities, overcrowded classrooms are a part of the past, and declining enrollments are an emerging concern. With careful community analysis and efforts at long-range projecting and planning, boards of education and school administrators may avoid problems related to closing schools, releasing teachers, balancing budgets and explaining why per pupil costs continue to increase. People within communities should be made aware of the likely enrollment trends and be involved in seeking solutions before problems become severe.

Projecting School Enrollments at the Local Level

Local planners can utilize several approaches in projecting enrollment trends. Some are more sophisticated and more reliable than others; each has its limitations when used alone. The following are frequently mentioned under various names:

- Historical survey - a study of past enrollment data to place projections in perspective.

- Survival and retention ratios - the percentage of (1) resident live births to first grade enrollments (survival ratio), and (2) the number of students in one grade progressing to the next grade in a subsequent year (retention ratio). The calculations are based on the premise that migration patterns, mortality, nonpublic school enrollments and dropout rates will remain constant. The ratios should be revised annually. This approach is illustrated in the Addendum to this chapter.

- Statistical-regression model - mathematical equations defining relationship between live births and school enrollments.[6]

- Community indicator survey - a study of social, financial and residential factors of the community and their impact on changes in school enrollments.

The intent of this section is to provide assistance to individuals who have limited experience in making enrollment projections. By utilizing the three tables in the Addendum to this chapter, local district personnel will find computing projected enrollments to be relatively easy. However, obtaining data on resident live births on which to base the computations may be somewhat difficult.

The Illinois Department of Public Health publishes data on resident live births by cities having 10,000 or more population and by counties.[7] If the boundaries of a school district do not correspond to the boundaries of a city having 10,000 or more population, an estimated number of resident live births may be calculated by the following formula:

$$\frac{X}{\text{County resident live births}} = \frac{\text{local first grade enrollment}}{\text{county first grade enrollment}}$$

(X = local district resident live births)

A local census obtained by canvassing the community may be conducted in small districts to obtain information on resident live births. The response to a census is better when questions are kept to a minimum. Three questions would normally be sufficient for making enrollment projections: What is the birth date of each preschool child in the home? Will the children attend public or nonpublic schools? Which attendance center(s) will the children most likely attend?

After obtaining resident live birth data for a period of five to ten years, the local planner can utilize the tables in the Addendum to this chapter: Table VI, to project first grade enrollments; Table VII, to project the retention ratio from one grade to the next grade in a subsequent year; and Table VIII, to develop projected enrollments for all grades.

Enrollment projections calculated on past number of live births and retention ratios are based on the premise that what has happened historically will continue to happen. The projections do not provide fully for the impact of changes in variables such as migration, nonpublic school enrollments, school dropouts and live birth rates on school enrollments. If aware of these changes in the community, the planner can adjust the projected enrollments accordingly.

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[6]See Appendix B for a discussion of survival ratios and statistical-regression models.

[7]See "Vital Statistics Special Reports," Bureau of Statistics, Department of Public Health, Springfield, Illinois.

Warning Signals for Changes in Enrollment Trends

Projecting enrollments is not an exercise in futility. A deviation between the projected trend and actual enrollments is a warning signal. Local administrators should analyze the situation for factors which contribute to changes in enrollments. The following list includes the major variables:

Changes in birth rates

Shifts in nonpublic school enrollments

Changes in student dropout rates

Mobility of population
(e.g., movement from city to suburb, one community to another, and one section of a community to another)

Changes in age range and income levels of residents

Transportation changes
(e.g., new highway construction, airport expansion, location and/or relocation of transit lines, and gasoline shortage and increased costs - the energy crisis may inhibit residential development on the metropolitan fringe)

Community developments
(e.g., availability of land for housing developments, zoning changes, land reclaimed for municipal improvements, acquisition of open space for parks, changes in land values and taxes, integration and racial migration patterns, and closing of a military base)

Availability and cost of housing
(e.g., housing turnover in relation to length of residency in an area, availability of low to moderate cost rental property, and number of houses for sale)

Major shifts in residential building patterns
(e.g., types of housing - condominiums, garden apartments, high rise apartments, houses with one or two bedrooms and houses with three or more bedrooms)

Employment opportunities and trends
(e.g., location and/or relocation of business, industry, or shopping centers; effects of automation; changes in national market for local products; and proximity to developing communities)

The circumstances related to some of the above factors may increase or decrease enrollments. For example, new highway construction in unpopulated areas tends to result in new houses being constructed in the area and increases in population. However, new highway construction in a highly developed area will cause homes to be torn down in the construction path and will tend to decrease enrollment.

The construction of single houses will tend to attract families with children to an area. On the other hand, the construction of apartments and condominiums will tend to attract single persons, childless couples and retired people. Also, the number of children in an area is related to the average number of bedrooms per housing unit. A substantial turnover of used housing previously owned by older people to families with younger children will increase enrollments at school attendance centers in the vicinity. Increasing cost of homeownership tends to discourage young families from moving into some areas of a community, and as a result the homes will continue as residences of older middle to high income persons.

Sources for Assistance in Projecting Enrollments

Local boards of education and administrators should tap private and public sources for data which indicate changes in population. The decennial federal census is not conducive to detailed planning, but it can provide baseline data for estimating current statistics. Community colleges and universities will likely have community studies and other resource materials. State and regional officials may be able to provide information on industrial and highway developments and birth rates. Municipal officials should have information on projected community developments and zoning requirements. Property brokers may be aware of potential industrial or office developments. Major public utility and telephone companies most likely have studies including estimates on the number of new connections and population increases. Local service and religious groups can provide information on the changes in the numbers and age range of persons served. Savings and loan companies have information on migration trends and whether new owners tend to have children. Major employers may be willing to release information on expansions, cutbacks and relocations. Moving companies have records on the mobility of residents. Land developers generally have information on which to project population changes. The information supplied by any group should be evaluated as to whether it is based on factual or estimated data. In summary, it is to the advantage of school planners to develop contacts with these and other information resources in the community.

School boards and administrators may also need the assistance of task forces to obtain the viewpoints of others in the community in regard to community development projections and their implications for school enrollments. Members should include students, faculty, parents, and representatives of community organizations, religious groups, and the media. Projected enrollment trends must be developed, presented, digested and accepted before approaching specific implications.

SUMMARY

Enrollment in Illinois public schools, grades K-12, is projected to decrease from 2,373,659 in the fall of 1971 to about 1,894,000 in the fall of 1985. This represents a 20 percent decrease during a fourteen year span. The actual future enrollment will be related to changes in the number of resident live births, migration patterns, nonpublic school enrollment, and dropout rates.

The statewide elementary school enrollment reached its highest level in the 1970-71 school year and has consistently decreased since that time. A continued annual decline is projected through the 1985-86 school year. The projected enrollments throughout the 1980's will be increasingly influenced each year by the future number of Illinois live births.

The statewide high school enrollment is expected to peak in the 1975-76 school year, then start a decline extending into the 1990's. If in 1975 or soon thereafter the number of live births begins to increase, high school enrollments will start increasing during the 1990's.

Although the majority of counties in Illinois have decreasing enrollments, a few downstate counties and several adjacent or near Cook County show increasing enrollments.

School administrators and boards of education should be alert to changes in local enrollment trends. They need to make enrollment projections on which to make decisions before emotional and financial crises arise. Enrollment projections are essential in considering future utilization of facilities, curriculum changes, staffing and per pupil costs. Local persons in the community should be involved in studying the community factors related to declining enrollments and planning educational changes.

RECOMMENDATIONS

The Illinois Office of Education should continue to provide services which will benefit local school districts in their efforts to plan for declining enrollments. The following are suggested by the Task Force on Declining Enrollments:

1. The Illinois Office of Education should continue to monitor enrollment trends on an annual basis, using the latest birth statistics and other information each year to improve enrollment forecasts and to extend them farther into the future.

2. So that the Illinos Office of Education can have the best possible data available for making enrollment forecasts, the IOE should impress upon local superintendents the need for very accurate statistics. For districts with ungraded classes, it is essential that the local superintendent identify the number of students who would otherwise fall in each grade level or at least prepare a distribution of students by age. Use of the survival or retention ratio methods of projecting enrollments requires such information.

3. The Illinois Office of Education should investigate the feasibility of collecting and analyzing data on student migrations in and out of local school districts and in and out of state.

4. The Illinois Office of Education should encourage regional superintendents of schools and local district superintendents to take an active role in enrollment projecting and planning. The Task Force recommends that regional superintendents should be responsible for making data available and coordinating the work of local districts.

5. The Illinois Office of Education should seek funds for the purpose of making personnel available to assist local districts in preparing enrollment forecasts and in planning in accordance with those forecasts.

ADDENDUM TO CHAPTER I

SAMPLE TABLES AND INSTRUCTIONS TO PROJECT FIRST GRADE ENROLLMENT, THE RETENTION RATIOS, AND ENROLLMENTS FOR ALL GRADES

TABLE VI

DEVELOPING SURVIVAL RATIOS AND FIRST GRADE ENROLLMENT PROJECTIONS

Births		First Grade Enrollment			
Calendar Year (1)	Number of Resident Live Births (2)	School Year (3)	Fall Enrollment (4)	Survival Ratio Col. 4/Col. 2 (5)	
1965		1971-72			)
1966		1972-73			)
1967		1973-74			) Actual
1968		1974-75			)
1969		1975-76			)
1970		1976-77			)
1971		1977-78			)
1972		1978-79			) Projected
1973		1979-80			)
1974		1980-81			)
1975		1981-82			)

INSTRUCTIONS FOR TABLES

Instructions for Table VI (page 20)

1. Column (2) - Fill in the number of resident live births for each year.

2. Column (4) - Fill in actual first grade enrollments for school years 1971-72 through 1975-76.

3. Column (5) - Fill in survival ratios for years 1971-72 through 1975-76. (Calculate ratios by dividing actual enrollments by resident live births.)

4. Column (5) - Find the average (mean) survival ratio for years 1971-72 through 1975-76 and enter it for years 1976-77 through 1981-82. (Use Judgement in eliminating any atypical ratio before calculating the average.)

5. Column (4) - Calculate the projected enrollments for years 1976-77 through 1981-82 by multiplying the number of resident live births by the corresponding survival ratio. Enter figures in column (4).

Instructions for Table VII (page 22)

1. Divide the second grade enrollment in 1971-72 school year by the first grade enrollment in 1970-71 to obtain the retention ratio for grade two. Record the ratio in the 1971-72 column on line 2.

2. Using the same precedure as in step (1), figure the retention ratio between the first and second grades for each remaining school year. (Divide the second grade enrollment by the first grade enrollment in the preceding school year.) Record each ratio in the appropriate column on line 2.

3. Inspect and compare the commonality of the ratios to determine which are representative of present and future trends and which, if any, are atypical because of unusual local conditions. Generally, the more recent years tend to be more representative of the near future.

4. Calculate the average (mean) retention ratio for those years which appear to be representative of present and future trends by dividing the sum of the ratios of the number of representative years.

5. Record the average (mean) retention ratio from first to second grade in the last column on line 2.

TABLE VII

DEVELOPING AVERAGE RETENTION RATIOS

	Relationship of One Grade	to Next Grade, Year Later	Retention Ratio* 1971-72	1972-73	1973-74	1974-75	1975-76	Average Retention Ratio
1	First	to Kindergarten (year earlier**)						
2	First	to Second						
3	Second	to Third						
4	Third	to Fourth						
5	Fourth	to Fifth						
6	Fifth	to Sixth						
7	Sixth	to Seventh						
8	Seventh	to Eighth						
9	Eighth	to Ninth						
10	Ninth	to Tenth						
11	Tenth	to Eleventh						
12	Eleventh	to Twelfth						

*Ratios should be figured for a five to ten year period. A ratio may be either greater or less than one.

**Kindergarten enrollments are calculated from first grade enrollments one year later.

6. Repeat steps (1) through (5) to obtain the average retention ratio from the second to the third grade and for each of the remaining grades in the table.

7. Divide the kindergarten enrollment for the 1970-71 school year by the first grade enrollment for 1971-72 to obtain the ratio of the first grade to kindergarten. Enter this ratio in the 1971-72 column. (Kindergarten enrollments tend to fluctuate in many districts since attendance is not compulsory.)

8. Figure and record the kindergarten ratios for each additional year by dividing the kindergarten enrollment by the first grade enrollment one year later.

9. Calculate and record the average (mean) kindergarten ratio ignoring those years of atypical ratios due to unusual conditions.

Instructions for Table VIII (page 24)

1. For each grade enter the average retention ratios from Table VII in the average retention ratio column in Table VIII.

2. Utilizing data from Table VI, column 4, enter projected first grade enrollments for 1975-76 through 1981-82 school years. (Grade one enrollments serve as the base grade.)

3. Multiply the kindergarten average retention ratio times the first grade enrollment for 1976-77 and record the answer as kindergarten enrollment for the 1975-76 school year.

4. Continue to calculate the kindergarten enrollments through 1980-81 by multiplying the kindergarten average retention ratio times the projected first grade enrollment one year later and record the answers as kindergarten enrollment one year earlier.

5. Multiply the second grade average retention ratio times the first grade enrollment for the 1975-76 school year and record the answer as the projected second grade enrollment for 1976-77 school year.

6. Continue to calculate projected second grade enrollments by multiplying the second grade average retention ratio times the first grade enrollments for each succeeding school year and record the answers as second grade enrollment one year later.

7. Repeat the procedures in steps 5 and 6 to calculate projected enrollments for each grade level through grade twelve.

TABLE VIII

DEVELOPING ENROLLMENT PROJECTIONS FOR ALL GRADES

Grade	Average Retention Ratio	Enrollments by Year												
		Actual	Projected											
		1975-76	76-77	77-78	78-79	79-80	80-81	81-82	82-83	83-84	84-85	85-86	86-87	87-88
K														
1														
2														
3														
4														
5														
6														
7														
8														
Total														
9														
10														
11														
12														
Total														
Grand Total														

CHAPTER II

THE ECONOMICS OF DECLINING ENROLLMENTS: ILLINOIS ELEMENTARY & SECONDARY EDUCATION

INTRODUCTION

When a sector of the economy reverses its trend from growth to decline, serious problems of adjustment should be expected. Elementary and secondary education, a major sector of the economy, is now faced with a declining demand for services due to a drop in the number of pupils. At the very least, decline will require a reallocation of resources within education and may mean some reduction of need for resources such as buildings. At the school district level, declining enrollments mean a difficult period of fiscal adjustment. And in many cases, decline will mean school district organizational adjustments, notably a decrease in the number of schools and districts. But decline will also require another adjustment. Educators will need to adjust their traditional thinking from anticipating more students to planning for fewer students.

This chapter examines the fiscal adjustment problems. The chapter will review some of the expenditure and revenue implications of declining enrollments. The extent to which costs can and cannot be reduced will be discussed. Many costs are fixed - at least in the short and intermediate run. On the other hand, state and federal revenues are closely related to pupil numbers. The chapter describes and illustrates the cost/revenue dilemma in a period of declining enrollments. Some approaches other states have taken to alleviate the problem are discussed. The results of the analysis lead to several committee recommendations for state level research and action.

The subject matter of this chapter is treated under the following headings:

School District Expenditures and Declining Enrollment

A. Costs continue to rise
B. Constraints on reducing expenditures during enrollment declines
C. Cost effectiveness and school district reorganization

School District Revenues in a Time of Declining Enrollments

A. Introduction
B. Federal revenues
C. State assistance
D. An illustration of school district revenue/expenditure problems

State Assistance to Local Districts in a period of Declining Enrollments

Summary

Recommendations

SCHOOL EXPENDITURES AND DECLINING ENROLLMENTS

Costs Continue to Rise

Although statewide enrollments will decline, costs continue to rise. The United States Office of Education, which projects a national enrollment decrease over the next decade of nearly 12 percent, estimates that between 1972-73 and 1982-83 operating expenditures for elementary and secondary education will increase by 25.7 percent and expenditures per pupil will increase 40.9 percent.1

TABLE IX

CURRENT VS. REAL PER PUPIL COSTS*

	Current	Real (1967= 100)**
FY '68	$ 737.77	$709.39
FY '69	804.51	733.37
FY '70	931.46	800.91
FY '71	1052.08	865.91
FY '72	1121.64	897.31
FY '73	1228.20	927.64
FY '74	1359.56	924.24

*Per pupil costs defined as operating expense per Average Daily Attendance.

**The consumer price index for June of each year is used to deflate the current dollar operating expenditures per ADA.

In Illinois the increase in operating expense per pupil has been dramatic. Operating expenditures per pupil were $738 in fiscal year 1968, rising to $1,360 by fiscal 1974. Although the increase in current dollar expenditures per pupil over the seven year period was $622, real expenditures per pupil (in terms of the value of 1967 dollars) increased only $215, from $709 to $924 (see Table IX). The impact of inflation upon school costs is illustrated by the difference between the current and the real per pupil expenditures. If past trends continue, by 1982-83 operating expenditures

[1]Harrison, Forest W. and C. George Lind, "Expenditures of Educational Institutions," in Projections of Educational Statistics to 1982-83 (1974 Edition), p. 94.

per pupil in Illinois will be greater than $2,000.[2] A considerable part of the increased cost is due to inflation, with the rest resulting from more and better services.

Constraints on Reducing Expenditures During Enrollment Declines

Only with staff reductions and/or the closing or leasing of facilities are significant reductions in expenditures possible. Usually, however, enrollment must decline for several years before such reductions are possible. Most expenses are fixed for short, intermediate or long periods of time; that is, for varying periods of time, some expenditures cannot be reduced even as enrollments decline. The Task Force recommends that the Illinois Office of Education undertake studies to determine, as precisely as possible, which school district expenses are variable and which fixed, in the short, intermediate and long run, as student numbers change. Some Task Force members did some initial work along these lines using the Annual Financial Report submitted to the Illinois Office of Education.

Using 1973/1974 data, these members estimated that of the total school district expenditure of $3.27 billion, thirteen percent (or $430.6 million) were fixed in the short-run (i.e., not subject to change for a year). Fifty-two percent of total expenditures (or nearly $1.7 billion) are fixed in the intermediate run (i.e., from two to five years are required for adjustment). Another thirteen percent of total expenditures ($424.8 million) are long-run fixed costs, requiring six to ten years into the declining trend before adjustments can be made. The remaining twenty-two percent were considered unrelated to changes in pupil enrollment and are therefore fixed for an indefinite period of time.

Of the $2.76 billion in the 1973-74 operating cost for the regular K-12 program, $2.09 billion (76 percent) went for salaries, only a small part of which can be adjusted in the immediate or short run.

The constraints on expenditure reduction when student numbers are decreasing is illustrated in the following hypothetical example of an elementary school building serving grades one through three - 100 students per grade. In this hypothetical school there are 25 students per classroom, with 12 classroom teachers, a principal, and a librarian. Other staff includes custodial help, clerical-secretarial staff, cafeteria workers, and staff to provide state mandated services. The major costs of educating the children in this school are salaries for the staff and personnel to maintain buildings. Enrollment decline due to diminishing birth rates will first be reflected in the first grade. In this example, there is, say, a first grade enrollment decline of 5 percent the first year, 7 percent the next year, and 9 percent the third year, and no net migration within the school's boundaries. After three successive years of decline, there is a total of twenty fewer first graders, twelve fewer second graders and five fewer third graders. With 37 fewer pupils in the school, a decrease of 12.3 percent, only in the third year of decline is there a real opportunity to reduce staff cost. There is an option to eliminate

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[2] Declining Elementary and Secondary Enrollments in Illinois: An Overview of the Implications. Statistics Section, Illinois Office of Education. February 1975, p. 33.

one first grade teaching position and in so doing increase the pupil-teacher ratio from 20 pupils per teacher to 26.7 per teacher. Another alternative is to assign a part-time teacher to the school. In either case, it is not until the third year of rather dramatic decreases in enrollment that there is an opportunity to have a significant reduction in costs.

Cost Efficiency and School District Reorganization

When the declining trend is over and enrollments stabilize, districts may be able to attain a new and more efficient level operation than that during the period of decline. Lower district enrollment may provide the opportunity to sell or lease facilities. Thus a new organization pattern is possible, one that will have fewer attendance areas as well as fewer teachers, specialized professional staff, and support staff.

Related to the above discussion is the issue of the optimal size of school districts. There is evidence that districts of a given size minimize cost per pupil. This size varies by type of district.[3] Certain small districts may, therefore, be unable to organize in such a pattern as to minimize per pupil cost, for at the beginning of the enrollment decline they were near or below the size required to produce the lowest cost per pupil. However, in order to make some judgment concerning efficiency, the quantity and quality of the educational product must be measured. It must be pointed out that per pupil costs will continue to increase due to inflation and the fact that unit costs of programs increase with declining enrollments. After the period of adjustment a new equilibrium may be reached where per pupil cost (measured in constant dollars) is higher than per pupil costs were at the pre-decline level, but lower than during the adjustment process - the period of enrollment decline, the adjustment in thinking to plan for decline or no-growth and intra-district reorganization, e.g., a reduction in the number of attendance areas. If cost reduction does not occur, then it is likely that the shrinkage in district enrollment has caused the district to pass through a size plateau of efficiency, in which case an efficient level through internal reorganization cannot be achieved. In such a case, long-term higher costs per pupil would be projected or efficiency may be attained only through consolidation.

Consolidation does not necessarily mean complete merger. It could mean keeping moderate sized districts intact and through functional consolidation delegating the authority for furnishing special teachers and services to an intermediate office. Such delegation may require an adjustment of the philosophy that all operational decisions must be made by local districts. In the fields of special education and vocational education,

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[3]Sabulao, Cesar M. and G. Alan Hickrod, "Optimum Size of School Districts Relative to Selected Costs," Journal of Educational Administration, IX; October 1971; and Hickrod, G. Alan, Ramesh B. Chaudhari, Thomas W.C. Yang, Ben C. Hubbard , "Cost-Size Relationship Among School Districts in Illinois, 1974," Center for the Study of Educational Finance, Illinois State University, August, 1975.

collaborative arrangements have already reduced local district responsibilities to provide all services on their own. However, rather than each specialized service that needs interdistrict collaboration having its own administrative hierarchy and boundaries, there should be serious consideration given to establishing intermediate service organizations for multiple services. The Educational Service Region or a suitable substitute for this office might well serve this function.

SCHOOL DISTRICT REVENUES IN A TIME OF DECLINING ENROLLMENTS

Introduction

Unlike expenditures, revenues to local districts from higher levels of government are very responsive to changes in enrollments. This responsiveness of revenues is due to the close link between state and federal aid to school districts and the number of pupils in the district. State assistance accounted for 44.7 percent of total Illinois school district revenue in 1974/75 and federal aid provided 5.8 percent of revenues. On the other hand, local support, which in 1974-75 amounted to 49.5 percent of revenues to districts, is not directly tied to pupil numbers.[4] However, there is the view that with a declining number of students there will be less likelihood of local voters approving tax and bond referenda. Among the reasons are that a lower percentage of the electorate will have children in school and that many voters will think that a district with fewer students does not need more money. The Task Force believes that this is an important topic for analysis and recommends that the Illinois Office of Education conduct a study of the impact of enrollment decline upon local voter support for bond and tax referenda.

Federal Assistance

Pupil numbers were related to more than $130 million of the $133.4 million in FY '75 federal program grants directed through the Illinois Office of Education. $89.6 million of these student-related allocations are tied directly to the number of pupils served in the district. The determination of the student count is related to census data in a number of these programs, notably Title I ESEA. Without changes in definitions the participant count will remain constant during the 1970's but will decline after the 1980 census due to fewer students. Allocations to school districts from the remainder of those programs tied to student participants should decline as student numbers decline, assuming Congress does not alter the allocation formulae or definitions. If Illinois' enrollment continues to decline at a more rapid rate than in other states, Illinois' share of federal money will decrease for those programs which allocate money based upon the state's share of the identified student population.

State Assistance

In regard to the impact of declining enrollments upon general state aid to local districts, the analysis undertaken indicates that on the average, and assuming no significant change in other factors, there will be an

[4] State, Local and Federal Financing for Illinois Public Schools, 1974-75, Office of the Superintendent of Public Instruction, October 1974, p. 4.

automatic reduction in revenue from general state aid with the loss of a pupil.[5] The magnitude of that change varies by wealth of district, by type of district and which of the two formulae is used to compute the state aid claim. The following generalizations summarize some major impacts of enrollment decline in regard to general state aid.

1) Because poor districts (i.e., those with low assessed valuations per student) are more heavily dependent upon the state for revenues than rich districts, the decline in state aid in response to enrollment decreases will have greater impact upon poor than rich districts.

2) School districts which use the Strayer-Haig Formula to compute their estimated state aid lose less general state aid as a result of a decline of a given number of students than is true of districts utilizing the Resource Equalizer Formula. On the average, school districts which use the Strayer-Haig Formula have fewer students, are wealthier, have lower educational tax rates, and receive less state aid per pupil.

3) High school districts lose less general state aid for each student lost than do elementary and unit districts. When Chicago District 299 is excluded from consideration, unit districts lose more money for each student lost than is true of elementary districts.

4) As the present formulae allow the districts to select the best six months ADA of the year just completed or the year prior, there currently exists a slight cushion to protect districts from the immediate impact of declining enrollment.

Table X presents a profile of the districts by type, which use the two formulae to compute estimated state aid claims. The average elementary district using the resource equalizer to determine its 1974-75 estimated state aid claim had a best six months ADA of 1258.47, 88 Title I eligibles, an operating tax rate of $1.62 per hundred dollars assessed valuation and an assessed valuation of $37,830,240. The 1974-75 estimated state

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[5]It should be pointed out that general state aid is not tied completely to enrollment but is also based upon indices of educational need. Greater resources are assumed to be required for high school students. Those districts using the resource equalizer also receive a weighting based upon the number of Title I Eligibles in the district. However, multiple correlation analysis indicates a very high linear relation between best six months average daily attendance (ADA) and general state aid, allowing the Task Force to relate directly ADA (enrollment) and general state aid.

TABLE X

AVERAGE VALUES OF VARIABLES INCLUDED IN THE MODELS
ANALYZING THE RESOURCE EQUALIZER AND THE STRAYER-HAIG FORMULAS

	Resource Equalizer Formula	Strayer-Haig Formula
Elementary Districts*		
1973-74 Best 6 Months ADA	1,258	529
1973-74 Title I Eligibles	88	33
1972 Assessed Valuation	$37,830,240	$40,885,810
1972 Operating Tax Rate	$1.62	$1.32
Assessed Valuation Per ADA	$28,426	$92,826
1974-75 Estimated State Aid Per ADA	$482	$115
High School Districts*		
1973-74 Best 6 Months ADA	2,012	735
1973-74 Title I Eligibles	109	19
1972 Assessed Valuation	$136,080,458	$116,603,610
1972 Operating Tax Rate	$1.52	$1.07
Assessed Valuation Per ADA	$68,348	$196,400
1974-75 Estimated State Aid Per ADA	$356	$76
Unit Districts*		
1973-74 Best 6 Months ADA	2,225	833
1973-74 Title I Eligibles	274	58
1972 Assessed Valuation	$45,664,130	$30,287,394
1972 Operating Tax Rate	$2.39	$2.01
Assessed Valuation Per ADA	$20,773	$40,054
1974-75 Estimated State Aid Per ADA	$519	$232

*There were 384 elementary districts, 128 high school districts, and 324 unit districts (excluding Chicago) using the resource equalizer formula to compile 1974-75 Estimated State Aid Claims. Using the Strayer-Haig Formula were 91 elementary districts, 7 secondary districts, and 117 unit districts.

aid claim for such a district would equal $614,378. If ADA had been 19.1 percent lower, as is projected in Chapter 1 for elementary enrollment by the fall of 1985, the estimated state aid claim would have been $221,258 less, or a reduction of 35.9 percent.

The typical high school district using the resource equalizer for its 1974-75 estimated state aid claim had a best six months ADA of 2012.22 with 109.45 Title I eligibles, an assessed valuation of $136,080,458 and an operating tax rate of $1.52 per hundred dollars assessed valuation. The estimated 1974-75 state aid claim for such a district would equal $684,789 and would decrease by $242,835 (or 35.5 percent) if 1973-74 ADA had been 15.7 percent less, as high school enrollment is projected to be by 1985.

Excluding Chicago school district 299, the 324 unit districts which used the resource equalizer for their 1974-75 estimated state aid claim can, on the average, be characterized as follows: a best six months ADA of 2225.40 with 274 Title I eligibles, an assessed valuation of $45,664,130 and an average operating tax rate of $2.39 per hundred dollars assessed valuation. This average unit district would have an estimated 1974-75 state aid claim of $1,219,548, which would have been $382,967 (or 31.4 percent) less if ADA had been 18.1 percent less, as total enrollment is projected to be by the fall of 1985.

As can be seen from Table X those districts using the Strayer-Haig Formula to compute estimated state aid are, on the average, smaller in terms of average daily attendance, have lower tax rates with higher assessed valuations per pupil, and have fewer Title I eligibles. The 1974-75 estimated state aid claim for the average elementary district using the Strayer-Haig Formula would equal $68,449 and would have been 47.7 percent less, or $32,646, had the ADA been 19.1 percent less. High school districts, on the average, received $55,687 under the Strayer-Haig, which would decrease approximately $8,663 or 15.6 percent if 1973-74 ADA had been 15.7 percent lower. The 117 unit districts using the Strayer-Haig Formula average $231,994 in estimated state aid claims, which would have decreased $86,913 or 37.5 percent had their ADA's been 18.1 percent lower.

For those districts using the resource equalizer formula, the total reduction in state aid would have been $84,963,000 for the elementary districts, $31,083,000 for the secondary districts, and $124,081,000 for the unit districts. (See Table XI.)

Elementary districts using the Strayer-Haig Formula would have received $2,971,000 less in general state aid; the seven high school districts, $61,000 less, and the unit districts would have received $10,169,000 less.

It should be clearly stated that this is not a projection of state aid in 1985. In addition to ADA, all other variables determining state aid

TABLE XI

ESTIMATED 1974-75 STATE AID CLAIMS, IF 1973-74 BEST SIX MONTHS ADA'S HAD BEEN AT LEVELS PROJECTED FOR ENROLLMENT BY THE FALL OF 1985*

Type of District	Resource Equalizer Formula			Strayer-Haig Formula		
	Decrease in State Aid Per Student Lost	Total Estimated Claim	Reduction of Claim Due to Enrollment Decline	Decrease in State Aid Per Student Lost	Total Estimated Claim	Reduction of Claim Due to Enrollment Decline
Elementary	$920***	$238,739,000	$ 84,963,000	$323	$ 6,215,000	$ 2,971,000
High School	769***	87,666,000	31,083,000	75	390,000**	61,000**
Unit****	951	395,200,000	124,081,000	576	27,067,000	10,169,000

*The enrollment data used to project the estimated state aid levels is from Chapter I. As the enrollment projections are not based on enrollment by type of district it is assumed that projected decreases at the elementary level reflect the decreases of elementary districts, at the high school level reflect the high school district decreases, and that the total rate of decrease reflects the unit district decrease.

**With only seven high school districts using the Strayer-Haig Formula, the population size is insufficient to provide a significant statistical relationship.

***It is the explicit policy of the state to recognize that greater costs are incurred in educating high school students than in educating elementary students. This is recognized by the inclusion in the formulae for computing general state aid claims of a weight of 1.25 for each ADA at the high school level. However, because the relationship between enrollment and ADA is more direct than that of enrollment with Weighted Average Daily Attendance, best six months ADA was utilized in the regression models. Regression models using Weighted Average Daily Attendance changes the magnitude of the regression coefficients, which are reflected under the heading "Decrease in State Aid Per Student Lost." However, the Weighted Average Daily Attendance model does not change the generalizations made on page 30.

****Chicago District 299 was not included because its size distorts the statistical relationship.

including the formula itself, change. However, the data demonstrate the decreases in estimated 1974-75 general state aid claims if the best six months ADA had been at the levels that enrollments are projected to be by the fall of 1985. The state would have paid a total of approximately $253,327,000 less in general state aid to Illinois school districts in 1974-75 if ADA's had been at a level projected for enrollments. As the estimated excludes Chicago District 299, this represents a 33.5 percent reduction in estimated state aid claims.

An Illustration of the School District Revenue/Expenditure Problem:

The following is an illustration of the revenue/expenditure problem local districts face in a period of declining enrollments. Consider the case of an elementary district using the resource equalizer to compute its estimated state aid. Assume that the hypothetical district has a total expenditure per pupil of $1300.

When the district loses one pupil, its total expenditures do not fall by $1300 the year the pupil loss occurs. Rather, as was stated on page 27, the loss of the student will allow total expenditures to be reduced by 13 percent of the $1300 within the first year after the loss of the student, or total expenditures decline of $169. Between the second and the fifth year after the loss of the pupil, an additional 52 percent of the cost of educating the lost pupil can be retrieved. That is, by the end of the fifth year after the initial decline, $845 of the $1300 that it cost to educate the lost pupil can be cut from total expenditures. By the end of the tenth year, the school district will have been able to cut $1014 of the $1300 in total expenditures that it cost to educate a pupil who was lost ten years earlier. The remainder of the expenditure for the pupil, $286, is fixed for an indefinitely long period and will not be recovered by the school district. It is between the end of the eighth and the ninth year that the annual rate of decrease in total expenditures, attributable to the loss of one student, is equal to the reduction in general state aid attributable to the loss of that same pupil.

The difference between the rate of decrease in state aid resulting from the loss of a pupil and the rate of reduction in expenditures allowed due to the loss of the pupil represents the excess burden placed upon school districts, due to differences in the relative high responsiveness of state aid and the relatively low responsiveness of expenditures to enrollment decline. Holding all other considerations constant, the two variables will becomes equal at some point in time. Beyond that point in time, the reduction in total expenditure will be greater than the loss in state aid and will approach the full cost of educating the pupil. For a graphical illustration of this phenomenon, see Appendix C.

STATE ASSISTANCE TO LOCAL DISTRICTS IN A PERIOD OF DECLINING ENROLLMENTS

Recognizing the financial hardship which declining enrollment creates for school districts, a number of states have adopted or are considering adopting various methods to cushion the fiscal impact of the decline in

enrollment. The most typical approach to cushioning the decline in state revenues is accomplished by slowing the rate in the decline of claimable pupils. This approach is utilized by California, Colorado, Illinois and Minnesota.

In California, districts experiencing a decline in excess of 1 percent of the previous year's enrollment may claim up to 50 percent of the lost pupils for reimbursement purposes. Colorado allows districts to use the largest of the following three average daily attendance entitlements: (a) the first year preceding the budget year, (b) the second year preceding the budget year, (c) an average of the three years immediately preceding the budget year. Illinois allows school districts to select the higher of the best six months average daily attendance of the two previous years. Kansas provides assistance for those districts with enrollment declines of 10 percent or more.

Minnesota has a system that provides a cushion for districts experiencing declining enrollment, as well as "fast growth" districts (defined as a 2 percent enrollment increase). Except St. Paul and Minneapolis, all districts which are experiencing declining enrollment may claim 0.6 of the one-year decline. Minneapolis and St. Paul are allowed to claim 0.5 of the one-year decline.

SUMMARY

In order to minimize the trauma of enrollment shrinkage, school administrators and boards must make a number of adjustments. The initial adjustment will have to be a mental adjustment. Rather than making plans based upon continued growth, educators in most districts must plan for fewer students. Planning and community involvement are critical ingredients in facilitating the adjustment. Through these means ideas will surface which should be considered as a district seeks cost efficiency when the student base is shrinking. This chapter has attempted to clarify the economic dilemma of declining enrollment--a dilemma created by the high proportion of fixed costs in education and the responsiveness of state and federal revenue to changes in student numbers.

School district expenditures and revenues will likely attain a new level of equilibrium. When fiscal and reorganizational adjustments are finally complete, all other things being equal, there will be relatively fewer resources in education and there will be a reallocation of resources within education. If school districts are forced to make these adjustments without state assistance, the hardships created will be greatly increased over those necessary to attain a new cost efficient level of operation.

RECOMMENDATIONS

Solutions to the economic problems created by declining enrollment in Illinois must be based upon a combination of legislative effort and "tight" financial planning and allocations at the district level. In various parts of this report, alternatives are offered which, if adopted, could

reduce school district expenditures. However, the Task Force has identified a number of areas where the State Board of Education, the Illinois Office of Education and/or the legislature should act to help resolve the economic dilemma of declining enrollment--a dilemma created due to the rigidity of school expenditures and the immediate responsiveness of state aid to enrollment decline.

Therefore, the Task Force recommends:

1. That the Illinois Office of Education should provide technical assistance in school management, focusing upon cost saving techniques and upon how to plan and budget for declining enrollment.

2. That the Illinois Office of Education undertake an in-depth investigation of variable and fixed costs in elementary and secondary education. Two products of such an investigation should be (1) a model to project revenue and expenditures by major category; and (2) an investigation of economies of scale determining optimal size for minimizing cost in the short and in the long run.

3. That the Illinois Office of Education should conduct a study of the impact of enrollment decline upon local voter support for bond and tax referenda.

4. That for a specified period of time general state aid should be made less immediately responsive to changes in pupil numbers. As general state aid represents the largest proportion of state aid, the State Board of Education should seek the passage of legislation which would slow the rate of loss of claimable pupils. Alternatives that should be considered include the following:

    a) For a specified period following the beginning of the enrollment decline, allow a district to count one-half of the best six months ADA of claimable pupils lost from one year to the next. The approach allows the district a period of time to adjust to a new level of efficient operation.

    b) For a specified period of time allow school districts to use the highest of the best six month ADA figure for <u>any of the last three years</u>. Presently, districts may select the best six months ADA of the year just completed or the year prior.

The Task Force suggests the following caution before laws are enacted by the General Assembly for districts with declining enrollments. A simple example will serve to illustrate: two unit districts - A with 2,000 Weighted Daily Average Attendance and B with 2,200 Weighted Daily Average Attendance, both of which have the same tax rate and the same assessment. Obviously District B with 2,200 students would get more state assistance than District A and both would get the same from local taxes. However, if over a period of two years District B lost 200 pupils while District A remained the same, under the present law both would get

exactly the same number of dollars from both state and local sources and would have available the same number of dollars per pupil.

However, because District B had a larger number of pupils two years previously, it may need more state money because of the adjustment period. In the long run, the state will have difficulty supporting any long-run plan that pays more to District B than A. Adjustment measures should be viewed as short to intermediate term allowances due to the differences in the responsiveness of expenditures and revenues to the loss of students. Therefore, the Task Force recommends that adjustment benefits to be granted to districts should be limited to a specific time period.

CHAPTER III

FACILITY CLOSING

INTRODUCTION

Although school building closings may appear to be a routine, data-based procedure, in fact the process demands the utmost skill, care and effort on the part of administrators and school board in planning, public relations and community involvement.

When faced with a decrease in pupil enrollment, districts are likely to find facilities under-used. One solution to the problem is the closing of certain schools, that is, the ceasing of public educational programs at a single free-standing building. Once it has been established that a district will go through a period of enrollment decline, communication of the likely implication to all segments of the community by the administrator and/or the school board is a vital step. From the beginning, an administrator and/or school board must make the community aware that the community, not only the administrators and school personnel, has a problem that must be solved together. Studies have shown that whenever citizens are directly involved in an issue, an administrator can usually rely on their support and cooperation in dealing with the problem. To involve effectively the community there must be enough planning and lead time before any action is taken. The issues should be discussed weeks and months before a school is closed, since the public needs to be psychologically prepared for such a change. There should be time not only for dialogue and clarification, but also for the consideration of various options as well as "task force" reporting.

In summary, the process of school closing probably more than any other aspect of declining enrollments requires community involvement. Thus, Task Force members, in recommending the procedures for school closing presented in this chapter, paid particular attention to the subject of widespread participation in planning and decision-making.

The material of this chapter is covered under the following headings.

Widespread Involvement in the Process of School Closing

A. Groups to involve
B. Public hearings
C. The interests and concerns of various school groups

Criteria for Facility Closing

Leasing and Sale of School Facilities

A. Leasing facilities
B. Some legal aspects of the sale of school buildings
C. Finding a buyer

Recommendations

WIDESPREAD INVOLVEMENT IN THE PROCESS OF SCHOOL CLOSING

Groups to Involve

1. School Board: As the policy makers for the school district, the school board should be as aware of the issues and as active as the administrators in involving the community in the identification and solution of the problems associated with declining enrollments and surplus space.

2. School Personnel: At the time the school board and administrator are prepared to involve the community, school personnel including principals, teachers, teacher-aides, and students should simultaneously be made aware of facility issues through direct communication and be invited to participate in the problem-solving process.

3. Citizens' Committees: One way to involve interested citizens is to have them serve on an advisory council, citizens' committee, or task force to assist in studying the problem, collecting important data (possible through community surveys), disseminating information to the community, and making recommendations for the school closures. One important factor is that any citizens' committee dealing with school closure must be representative of the major groups in the district. Those districts who use only citizens from the attendance area of the school should not be surprised to find a unanimous citizen's committee report recommending keeping the school open forever. The more narrow the committee make-up, the more limited the options considered.

   Part of the administrator's responsibility is to build public confidence that all major issues relating to school closures have been carefully thought out and adequately covered, i.e., street crossing hazards; busing costs and new routes; preservation of the neighborhood school; decline in property values; future care and use of the closed facility; status of school personnel and others.

   If the community feels that the situation is in capable hands (especially if the citizens themselves are involved), an administrator will be faced with far less trouble and fewer complaints. Thus, the administrator ought to keep the public informed and involved as different phases are begun and completed.

4. Outside Consultants: Outside consultants can be very helpful to the local board. They should be selected for competency, objectivity, and ability to build trust. Their study should be thorough with excellent documentation, charts, media, etc., for effective communication to the various concerned groups.

Public Hearings

Rather than just one public hearing, the school district should consider having a number in order to be representative and effective. School closure is a process, not a one-shot attempt, and thus public hearings should correspond to the various phases of school closing. Task Force members have identified a number of recommended procedures pertaining to public hearings. They are:

1. Usually it is unwise for a board to vote on a school closure issue the same night as the public hearing.

2. The public hearing must avoid the appearance of hasty decisions. The relationship between loss in enrollment and fiscal problems needs much public consideration prior to and with the issues of school closing.

3. The sequence of the agenda at the public hearing is important. Task Force members recommend the following procedures: First, there should be the presentation of research and findings by the consultant and/or study group with the specific recommendations. Second, the superintendent of schools should present a specific written recommendation on the school closure. Third, the board president should open up the hearing for citizen participation. Fourth, the board, superintendent, and staff should respond to appropriate citizen concerns in an unemotional, objective and dignified manner. Fifth, the board president should then open up the discussion of the recommendations to the board of education. Sixth, in this or a subsequent meeting, as determined by the board, a board member will make a specific motion to:
   a. dissolve the attendance area of the school to be closed by a fixed date

   b. have the given school be permanently closed as an educational facility by a fixed date

   c. approve recommendation to reassign students from the closed school to new attendance areas

   d. authorize the superintendent of schools to take preliminary steps to lease or sell school property

   Seventh, there should be a vote by the board of education on the superintendent's recommendation.

The Interests and Concerns of Various School Groups

The major concern in school building closings has to be the people involved--parents, teachers, principals, children, and board of education. All have contributed in the past, and all have a stake in the future. Each has interests to protect, but each has concerns for the well-being of the children and the community as well.

1. Parents: The staunchest school supporter and most zealous educational advocate is the parent who may have spent years building a good reputation in the local schools. Often a parent has, over the years, carved out a sphere of influence and general acceptance for his or her school-age children and has expended personal resources at P.T.A.

functions and other school activities. The parent has volunteered in the classroom, headed up after-school activity clubs, and has invested time and effort while simultaneously meeting a variety of psychological-emotional needs.

When parents view local school closings, they see the threat of losing this personal investment and having to begin all over again in the process of building reputation, influence and acceptance in a new school.

2. Teachers: Just as parents are motivated by personal needs, so are teachers. Teachers may resist a school closing because of the possibility of a loss of job. For those teachers who will be transferred to other buildings, it will mean that they will have to reestablish themselves in a new setting. They will be concerned about their acceptance by a new neighborhood, by the existing faculty, and probably by a new principal

3. Children: Children are affected by school closings in many ways. Like their parents and teachers, they will be apprehensive of the changes they will meet in the new building, the possibility of a new principal, the unknown teachers, and the "already-there" children. Experience has shown that children generally adjust readily to new situations and most will do so in a new school. Building principals of the receiving and phased-out buildings are in the best position to alleviate students' concerns.

4. Principals: Principals and other administrators are not always in full support of a school closing. Principals may be losing all or part of a staff with whom they have developed a working rapport, a staff which recognizes and acknowledges their sense of priorities in curriculum, building behavior, and instructional style. In effect, they run the risk of having to create once again a reputation should they be transferred to a new school with a new staff of teachers. One effective way to help the principal alleviate concern is for the board of education to have a policy that, should another administrative position not be open and the principal is assigned to a teaching position, the individual will be given the first opportunity to take a new administrative position if he or she desires to return to such a post.

5. Board of Education: Board members expend considerable energies protecting the leadership positions they have built as elected public officials. There is always the possibility of having a well-established school board reputation as well as reelection possibilities shattered due to the emotions and conflicts surrounding the planning and management of school closings.

6. Community: Closing a school is a much more difficult community relations problem than building and opening one. A proposal for closure usually brings out vested interests and hostilities. When citizens learn that their school district is considering closing one of its facilities, the implication is retrenchment, future trouble, a declining neighborhood, and more. In a rural area, especially, school closure signifies the decline of the community and its culture.

If school districts decide to close some of their facilities, new boundaries will have to be developed. With these changes, students may be mixed with other students from a very different social, economic, and ethnic background. For many individuals, this integration of persons will cause stress and tension as values and behavior conflict. Deep seated resentments may develop if an administrator does not handle the situation very carefully. Such feelings will usually not be discussed openly by the community since it seems inappropriate and "un-American" to differentiate among people. But, an administrator must be aware of such possible attitudes and hostilities and perhaps will decide that the best way to handle the situation is to bring such feelings into the open so they can be overcome through honest and open discussion.

In addition, if administrators and school boards begin to "cut" expenses and consider school closings, parents often react with the feeling that "the district is more interested in fiscal concerns than the students and their education." As a result, school administrators must continue to stress that in order to maintain the high level of educational quality in a time of inflation and declining enrollments certain expenses must be cut. A case needs to be made that quality education and fiscal stability are mutually compatible, rather than mutually exclusive.

CRITERIA FOR FACILITY CLOSING

When the decision has been made that there is sufficient surplus space in the district to consider closing a school building or buildings, criteria must be developed to identify which building(s) should be ranked high or low priority for closing. Among the criteria that need to be considered in planning for school closure are the following:

Educational Adequacy is a measure of the ability to meet the requirements of a good instructional program. In an evaluation of the facility, factors to be considered include capital improvement needs, capacity as it relates to programs, facilitating or retarding of the integration program that might result by the closing, and several miscellaneous factors such as playgrounds.

Operational Costs consist of those buildings' operating costs which fluctuate little, if at all, in relation to the number of students in attendance. Such costs include utilities, building maintenance, operating costs and supplies, and average salaries for principals, secretaries and custodians.

Enrollment represents the number of students housed in a school. Additional factors that should be given consideration are the relationship between a school's present enrollment and its capacity to absorb an increase in enrollment due to the closing of other schools, the socio-economic character now and that projected of the attendance area of the school under consideration for closing, future enrollment identified by preschool census, and intra- and inter-community migration patterns. (See Chapter I, section three, for a related discussion.)

Alternate Use evaluates the adaptability of the building and site to a partial or complete non-educational use, such as service for adults or libraries, museums or health functions. Zoning laws should be checked.

Modernization Potential evaluates the ease of renovating each facility. Such items as the general plan of the building, the structural components, and heating and ventilation system should be considered.

Building Capacity refers to the number of students the school is capable of housing. Other factors to be considered are the age and condition of the building and accessibility to fire protection.

Traffic and Safety Considerations include major freeways or arterials which impact the school's attendance areas and create hazards to students walking to school.

LEASING AND SALE OF SCHOOL FACILITIES

Leasing Facilities

Leasing is the best alternative if there is any likelihood that school facilities will once again be needed for public educational purposes. It would be unwise both fiscally and in terms of community relations to have sold a building and to find in five or ten years that additional facilities are needed in the district and then to have to persuade the public of the need for funds for the construction of a new building. To increase the chances of a good long-run decision, substantial efforts should be made to project likely community trends. (Chapter I, Section 3, provides guidance along these lines.)

Leasing of part of a building bringing joint occupancy of students with another segment of the community may not only be fiscally advantageous to the district, but educationally sound. Such leasing brings pupils into daily interaction with other groups. Senior citizens' clubs, day care centers, special education facilities, health and social service agencies are usually quite compatible with regular school programs. Chapter five deals in considerable detail with the program opportunities - both educational and non-educational - in school facilities with surplus space due to declining enrollments.

In 1975, there were several changes in state law expanding the discretion of local districts in leasing school property. In the past, school districts could lease property for up to ten years to "another school district, municipality or body politic and corporate . . . upon such terms and conditions as may be agreed if in the opinion of the school board such property will not be needed by the district during the term of such lease." As a result of 1975 legislation, the maximum term is now extended to 25 years. In addition, as a result of recent legislative action, districts are no longer limited to leasing to other local governments, but may lease facilities to "suitable lessees for educational purposes or for any other purpose which serves the interests of the community." According to the law "suitable lessees may include, but need not be limited to, any group, organization or legal entity which provides educational services, governmental services, social services, or civic services to the residents of the community." However,

leasing to non-local government agencies is limited to five years. Thus, districts may now rent their facilities for use as community centers in art, music and drama, and for many other purposes.

Some Legal Aspects of the Sale of School Buildings

Although a district should normally have legal counsel during the process of sale, the following paragraphs will summarize some of the major legal requirements involved in the sale of school buildings.

Section 5-22 of the School Code, dealing with the sale of school sites, buildings and other real estate, requires more than a simple majority of the votes of the school board members present. This statute requires that the initiating resolution be adopted by "at least two-thirds of the board members," which is construed to mean two-thirds of the full board membership--or five out of a seven member board.

A School Board may sell directly to another governmental body in accordance with the Municipal Transfer Act of Illinois. If the school is to be sold to another kind of agency, then the permission to sell must be secured from the Regional Board of School Trustees. The local board, through its administrative agent, will request that the Regional Board of School Trustees prepare a deed and title conveying the real estate to the buyer.

The resolution directing the Sale of Surplus School Property will contain the following:

---That the Board did by motion adopt the administrative recommendation

---That the students' educational welfare can best be served by being assigned to another attendance area

---That the building and property has become unnecessary as an educational facility of the school district

---That the Board desires to sell the property under the specified section of the School Code

---That the Secretary of the Board is ordered to notify the Regional Board of School Trustees of the decision of the Board to sell said property

---That the terms under which the Board desires that the said property be sold are specified (as indicated by legal counsel)

Notice of sale will be prepared and signed by the President and Secretary of the Regional School Trustees. In effect, the Regional School Trustees "own" the property in the name of the district and will conduct the sale. Usually these functions will be handled by the Educational Service Region. The sale, unless to another municipal body, is to be by public auction after due public notice of sale has been presented. The notice of sale will give a legal description of the property, indicating when and where bidding will take place. It will indicate what arrangements are involved, where the

terms of the contract can be reviewed, amount of earnest money required at the time of the public sale, and in what form money is to be conveyed. (See Section 5-22 of the Illinois School Code for recommended notice of sale.)

In the contract and public notice of sale, the seller should reserve the right to reject any and all bids made at the public sale.

Some local boards have been served with an injunction to prevent the sale of school property. When this occurs, it is a matter to be handled by the attorney for the Board. It should be pointed out that the legal process is somewhat different than that described above for special charter districts.

Finding a Buyer

The school district, its administrator, and school board must be prepared to take an active role in creatively selling the property on the market. An empty school building is not the type of facility on which real estate people are apt to spend a great amount of effort or money.

It is very possible to have a public sale of a school building and not have any bidders. In anticipation of this possibility, it is advisable to consider the following for assistance in locating buyers: local and regional real estate offices; publicity in local and regional news media and in trade journals; bankers; the Chamber of Commerce; the school district's citizens' committee; county and local government agencies; and other organizations and individuals with information about and contacts with potential buyers. For example, utility companies typically maintain real estate data for the purpose of bringing new industry into an area. State agencies, which are major space users in the state, can be identified and contacted through the State Department of General Services, Division of Real Estate and Leasing, in either Chicago or Springfield. This Department is responsible for finding space for all state agencies.

One of the first factors that school officials should explore as they consider potential buyers is whether the alternative uses of the buildings are compatible with the zoning restrictions of the local zoning board. It would be wise for school district officials to meet with the local zoning board to explore the various zoning changes which would allow a vacant school building to be used by a business or manufacturing company, rather than simply an alternative variation of the education process. It would be embarrassing for a school district to find a business interested in buying or leasing a school building, and spend time and effort in working out the details of the transfer, only to find the alternative unavailable due to zoning restrictions.

RECOMMENDATIONS

In the final analysis, the administration and school board must make all final decisions and bear the responsibility concerning declining enrollments and building closures. With careful preparation and consideration of the suggestions provided in this chapter, the school district can reach a satisfactory solution to surplus space and vacant buildings and in the process broaden the level of communication and participation of its community in the educational process.

Many school districts can benefit by outside help - help in finding buyers and help in the process of closing schools. Thus, the Task Force makes the following two recommendations:

1. The Illinois Office of Education should establish a Resource Center on Declining Enrollments. A major function of this Center would be to maintain a computerized data bank to inventory vacant classrooms and school buildings throughout the state. This Center should serve as coordinator between the potential users of school space (e.g., state agencies and community organizations) and school districts, so that potential users could contact only one source to get statewide information regarding school vacancies. In addition, this Center could assist local districts with legal concerns relating to closings and the sale of buildings.

2. The Illinois Office of Education should develop the capability to provide technical assistance to school districts on matters of community relations in the process of school closing, notably under stress situations such as community opposition to facility closing.

CHAPTER IV

STAFFING ISSUES IN A TIME OF DECLINING ENROLLMENTS

INTRODUCTION

This chapter summarizes staffing issues relating to declining enrollments at both the state and school district levels. The Illinois teacher supply and demand situation is the focus of the first part of this chapter; the second part focuses on local staffing issues.

The Teacher Supply and Demand Situation

A. The demand for teachers
B. The oversupply of college graduates
C. Early retirement
D. The retraining of teachers and reemployment help

Local Staffing Issues

A. Considerations in the development of a staffing study
B. School district personnel issues for consideration in a period of declining enrollments
C. Alternatives to reduction-in-force

The 60-Day Rules in the School Code

Summary of Recommendations of the Task Force on Declining Enrollments to the State Board of Education, the Illinois Office of Education and Other State Agencies

THE TEACHER SUPPLY AND DEMAND SITUATION

The Demand for Teachers

Normally, the higher enrollments and the lower average class size, the greater the demand for teachers. Although enrollments have declined in the past several years, the number of downstate Illinois teachers has increased slightly.[1] This increase is partly the result of a lowering of class size and partly the result of program additions. Future average class size in the state depends, of course, on the fiscal resources available.

Despite the slight increase in the number of downstate teaching positions during the 1970's (from 78,300 in 1970-71 to 80,700 in 1974-75), the turnover rate for teachers has decreased considerably, from 13.8 percent in 1970-71 to 10.1 percent in 1974-75. These trends have resulted in a reduction of openings filled during the four year period - from about 13,000 to about 9,000. Since the total number teaching in downstate public schools is projected to remain about the same from 1975-76 through 1977-78, while the turnover rate is expected to continue to decrease, the number of openings should continue to decline. The demand for downstate teachers may be as low as a range of 5,350 to 6,750 by 1977-78 (see Table XII.)[2]

Of the incoming teachers, a substantial minority have been reentering teachers, and of the beginning teachers some have been trained out-of-state. For the 1974-75 school year, of the incoming teachers 42 percent were reentering teachers and 58 percent were beginning teachers. Eighty-one percent of the beginning teachers were prepared by Illinois colleges and universities.

The Oversupply of College Graduates

Total supply clearly exceeds demand. Although there are no data on the number of former teachers seeking to reenter the profession, there are data on the number of teachers prepared by Illinois colleges and universities. In 1974-75, there were about 12,800 graduates of Illinois institutions of higher education completing bachelor and master degree preparation for elementary and secondary certificates. However, the recent trend is for a decline in the number of teacher education graduates.

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[1]Downstate in this discussion refers to all public school districts except Chicago.

[2]The source of most of the data in this section is Illinois Teacher Supply and Demand, 1974-75, Illinois Office of Education, Department of Planning and Research, Fall, 1975.

TABLE XII

A TIME TREND COMPARISON OF TEACHER SUPPLY AND DEMAND
IN ILLINOIS PUBLIC SCHOOLS*

School Year	Demand for Teachers in Downstate Illinois Public Schools	New Supply of Teachers Prepared by Illinois Colleges the Preceding Year	Supply/ Demand Ratio
1963-64		7,798	
1964-65	(12,850)estimated	8,831	(.69)e
1965-66	(13,000)e	9,440	(.73)e
1966-67	(14,150)e	9,929	(.70)e
1967-68	(11,850)e	10,600	(.89)e
1968-69	(14,600)e	12,310	(.84)e
1969-70	14,332	13,901	.97
1970-71	12,853	14,888	1.16
1971-72	9,894	16,650	1.68
1972-73	9,937	17,768	1.79
1973-74	9,263	15,875	1.71
1974-75	8,869	14,054	1.58
1975-76	(6,250 to 7,650)estimated	(12,800)e	(1.68 to 2.05)
1976-77	(5,800 to 7,200)e	(11,550)e	(1.60 to 1.99)
1977-78	(5,350 to 6,750)e	(11,100)e	(1.64 to 2.07)

*Source: Illinois Teacher Supply and Demand, 1974-75, Illinois Office of Education, Fall, 1975. Those wanting a good understanding of the supply/demand situation should consult this study. The demand information approximates the number of positions filled, was taken from the annual Teacher Service Record forms collected by the Illinois Office of Education, and includes full-time regular classroom teachers in all Illinois public school districts, except the Chicago public school system. The new supply of teachers shown in column 3 includes those prepared at both the bachelor's and master's degree levels. The information was collected by the Illinois Office of Education from Illinois colleges and universities as part of the National Education Association's annual study of Teacher Supply and Demand. The Supply/Demand Ratio in column 4 underestimates the oversupply of teachers. While the demand side does not include the demand in the Chicago schools, the supply side does not include former teachers seeking to return to the profession nor the new supply of teachers trained out-of-state seeking employment in Illinois.

In 1971-72, the peak year for the number of graduates, 17,768 students completed bachelor and master degree preparation for the standard teaching certificate in contrast to the 1974-75 figure of 12,800. (see Table XII.)

Although school administrators are interested in picking the best prospective teachers from a sizable pool of qualified applicants, the Task Force recognizes the market is oversupplied and that in many fields the number of graduates could be reduced in the interests of the job chances of young people. Therefore, students entering or considering entering teacher preparation programs should be provided with the best current information on teacher supply and demand. In the mid-1970's, disciplines or teaching fields that have an oversupply of teachers include social studies (e.g. government, civics and political science), regular elementary instruction, foreign languages, English and language arts, physical education, and speech and drama. The more serious shortages of certified teachers seems to exist in industrial arts, bilingual education, health education and some fields of special education.

In order to promote high quality programs and a teacher supply/demand balance, the Task Force on Declining Enrollments recommends that several studies be undertaken by the joint committee of the Illinois Board of Higher Education and the Board of Education.[3]

1. A study to determine the feasibility and desirability of a requirement that each public teacher training institution submit a five year plan on how it intends to adjust the number of students in its programs to lessen the general oversupply of teachers or, if it does not expect such an adjustment, to give the reason why. There could be plans to terminate selected programs that have few students. This plan could outline the methods of quality control being applied or expected to be applied to limit the number of people who enter into and remain in teacher education programs. The plan would also contain information and policies about methods of informing students of supply and demand situations. The plan would address the training and retraining of teachers in undersupplied areas. Perhaps some institutions of higher education as a result of going through the planning process would decide to abandon some or all of their teacher preparation programs. The submission of this plan could be made a condition for program approval.

2. A study of the feasibility and desirability of a five year bachelor's degree course of study as a requirement for certification in the state of Illinois. Among the tasks for the study would be to examine the California experience with the five-year program. Although the main purpose of the program is to produce more committed and better trained graduates of schools of education, the five-year program ought to have a corollary effect of reducing the number of students who complete

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[3]This committee consists of three members of each board for the purposes of improving relations and dealing with matters of mutual concern between the elementary/secondary systems and the systems of higher education.

their requirements for certification. The plan does not necessarily imply that students would have to take more education courses, only that such courses would be concentrated in the fifth year.

Although it is clear that the number of graduates of teacher training institutions should be reduced, any statewide quota or goal should be avoided either for limiting the total number of teachers that can graduate per year from Illinois teacher training institutions or in particular fields.

One reason for this approach is that there has been a downward trend since 1971-72 in the number of graduates. This trend is occurring without the imposition of a quota. Undergraduates responding to the declining number of openings in Illinois for beginning teachers in the 1970's have increasingly chosen other career fields.

A second reason is that demand over the next ten years may be higher than many expect. There are questions about the future birth rate, average class size, coming opportunities for and interest in early retirement, possible program expansion, the turnover rate, the number of former teachers wanting to return to teaching, the financial support for and costs of public education, and the number of teachers hired by Illinois school district but trained out-of-state. Thus the Task Force on Declining Enrollments does not support a quota system as a means of controlling supply and demand in teacher education. However, the Task Force on Declining Enrollments also supports the concept that each institution of higher education should be expected to review its own standards of admissions and retention with a view to greater quality control.

Early Retirement

The Task Force on Declining Enrollments endorses the position of the Board of Trustees of the Illinois Teacher's Retirement System supporting legislation providing for retirement at the age of 55 or after without discount with 20 or more years of credited service. It is possible now with 20 years of service to receive an annuity between the ages of 55 and 60 but with a discount (reduction) of 6 percent for each year prior to 60 years of age.

The following are points made in support of the Trustees' position.

1. While it is very unlikely that thousands of teachers would make an exodus from the classroom if the early retirement discount were eliminated, there would undoubtedly be more early retirements than under the present statute, thereby permitting some other teachers to keep their jobs during reductions in teaching staff.

2. Early retirement without the discount may allow local school districts to replace older, higher paid teachers who desire to leave the profession with younger teachers at a lower position on the salary schedule. Of course, if enrollments are declining considerably the district may decide not to replace the retired teachers at all.

3. Studies by the Teachers' Retirement System of Illinois indicate that the present value of a retirement allowance payable at age 55 without discount is less than the present value of an annuity payable at age 60, assuming five additional years of creditable service and a normal salary increase during the five year period. The actual value of an annuity depends, of course, upon trends in the cost of living and in teachers' salaries. (See Appendix D.) Of course, it is recognized that the replacement teachers will be accruing equities in the system which represent future liabilities.

4. The current inflationary situation has made it impractical, if not impossible, for many teachers to retire prior to age 60 with a discounted annuity even though there may be good reasons for retiring by about the age of 55.

5. A member retiring prior to age 60, with or without discount, is in effect discounting his or her annuity by early retirement, as opposed to teaching an additional 1-5 years and retiring thereafter with a greater retirement allowance. This takes three factors into account: 1) If the annuity is discounted, the discount lessens as the age of the retiring teacher increases. 2) Additional years of service provide greater benefits, particularly under a graduated formula. 3) The average annuity would probably be higher due to increased earnings during the last years of teaching.

There are other plans intended to promote early retirement. One is the California Plan adopted by the state legislature in 1974. It permits local school boards to establish regulations which allow their certified employees to reduce their workload from full-time to part-time duties.[4]

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[4]Such regulations must include the following:

1. The employee must have reached the age of 55 prior to reduction in workload.
2. The employee must have been employed full-time in a position requiring certification for at least ten years, of which the immediately preceding five years were full-time employment.
3. The option of part-time employment must be exercised at the request of the employee and can be revoked only with the mutual consent of the employer and employee.
4. The employee shall be paid a salary which is the pro-rata share of the salary the employee would be earning had he or she not elected to exercise the option of part-time employment, but shall retain all other rights and benefits for which the employee makes the payments that would be required by remaining in full-time employment.

Another plan adopted by some California districts follows: The teacher and the school district agree upon early retirement. The services of the ex-teacher are then contracted for on a part-time basis in some capacity other than that of a classroom teacher. Examples of part-time work are: working on staff development and in-service programs; helping with testing programs; orienting and providing aid to new teachers; and updating curriculum guides and other learning material.

As an independent contractor the ex-employee is no longer a contributing member of the State Teachers' Retirement System, begins to receive retirement payments and has the added income from part-time employment. A similar plan has been adopted by several districts in Illinois.5

The Retraining of Teachers and Reemployment Help

While for most fields in elementary and secondary education supply equals or exceeds demand, there are several scarcity areas. By 1975, the more serious shortages of certified teachers seem to exist in industrial arts, bilingual education, health education and fields of special education.

There are several issues and questions regarding the retraining of teachers. To what extent are interests and skills transferrable from the oversupplied fields? Who will pay for this retraining: the teachers? the state? the school district? Some school districts have salary incentives and tuition reimbursement plans which will permit some retraining. Should there be a major effort to retrain teachers, or should emphasis be placed on a rapid increase in the training of college students for the undersupplied fields? In order to fully explore these issues the Task Force recommends that the state Board of Education sponsor a statewide committee or several regional study committees on the retraining of teachers.

Members of the study committee should be school administrators, school of education faculty members and representatives of teacher organizations. The perspectives of at least these three groups are needed. This conference may generate proposals for the legislature to consider in its next session.

A related issue is the role of educational agencies in helping teachers find jobs outside the teaching profession. Officials of a school district and local educational groups should look into their community and make an effort to help find non-teaching jobs for teachers who have lost their jobs due to declining enrollments. The Task Force recommends that the state Board of Education sponsor a conference to be planned jointly with university people, school administrators and teachers, to bring together with these school groups major public and private employers in the state to assess alternative employment opportunities and to reassess the feasibility of a clearinghouse at the state level to help find jobs for teachers. These teachers would be not only those who have lost their teaching positions due to declining enrollments, but also tenured teachers seeking a new career.

5For further information on the proposals and plans discussed in this section, contact the Executive Secretary, Teachers' Retirement System, Springfield, Illinois.

What are the opportunities in educational publishing, personnel work, social work, government, office management and other fields that can be considered allied to education, particularly if they are expanding fields? To assess alternative employment opportunities for teachers and to have the basis for advising those seeking alternatives, it is necessary to know in what occupational categories people who leave education for one reason or another tend to find jobs. Therefore, the Task Force on Declining Enrollments recommends that the Illinois Office of Education conduct a study to find out what has happened occupationally to teachers who have left the profession.

LOCAL STAFFING ISSUES

Considerations in the Development of a Staffing Study

Every district in its planning, whether it is experiencing declining enrollments or not, has to take into account its future staffing needs. Thus every district should gather data regarding staffing and regularly update them. In order to achieve an orderly reduction of staff with minimum personnel anxieties, planning well in advance is required. In planning such a study a district will have to take into account its own data-gathering capability and the availability of affordable capable consultants. Even the smaller district should probably make some systematic effort to gather and analyze data. Among the recommendations of the Task Force is that the Illinois Office of Education provide the following kinds of assistance to local districts as they project their staffing needs - booklets, consultants, training. The following is a recommended list of the kinds of information districts might consider gathering as a part of their effort to develop sound staffing plans.

1. Generally in the past, what has been the level of attrition due to death, resignation, disability, retirement, failure to return from a leave of absence, firing for cause, and non-retention of non-tenured? What have been the patterns of attrition in the various departments and levels?

2. Enrollment projections - a staffing study would have to build on enrollment projections by grade level and at the higher levels by subject matter.

3. Projection of teacher needs based on class-size policies.

4. Programmatic data - projections of programs for initiation, expansion, reduction or elimination based on expected student demands, community needs, costs relative to benefits, and state mandates - existing or likely to be mandated.

5. Fiscal projections of locally derived revenue, state aid and federal grants.

6. Tenure data - number of teachers tenured and non-tenured. For the non-tenured, when must the tenure decision be made?

7. Sex, race - for affirmative action purposes.

8. Years of experience, seniority of each teacher.

9. A qualifications assessment - what each teacher is teaching and is qualified to teach; certification status, degrees, additional credits.

10. Age - for projecting retirements.

11. An estimate of the number of available former teachers, by subject matter, living in and near the district, who have an interest in returning to the classroom.

12. What are the educational methodological philosophies and goals of the district and what are the staffing requirements to meet these goals?

13. A qualitative assessment of the teaching staff - what data should be compiled about each teacher's performance?

14. Projections of the need for the non-professional staff--clerical, maintenance and food services workers in a period of declining enrollments. What has been the turnover record of people in these non-professional positions? Will attrition be adequate to meet the reduced need for these positions? To what extent is the number of workers needed in these non-professional fields related directly to the number of pupils?

School District Personnel Issues for Consideration in a Period of Declining Enrollments

The Task Force recommends that the Illinois Office of Education examine a representative sample of districts experiencing declining enrollments and disseminate throughout the state the various school board practices and negotiated contract provisions on personnel and the experiences associated with implementation.

Some staffing issues for a district to consider follow:

1. In making reduction-in-force decisions, to what extent should seniority in district be the overriding factor, or should other criteria be put into a mix of considerations - teaching ability based on performance ratings; degrees; credits in addition to degrees; certification; years of experience in teaching, in a grade level or in a subject. In other words, what standards are to be used in determining reductions in force? Because of the time and cost and the increasing resort to the courts associated with efforts to dismiss a tenured teacher, the Task Force recommends that some vehicle be developed for due process training for superintendent, board members and teachers. The associations representing those groups should consider conducting such training.

2. How does the number of tenured teachers within the district compare to the long-term staffing needs?

3. Should contracts for non-tenured teachers for one year and one-half year periods be considered?

4. Should there be a study on policies on leaves, and a consideration of the advisability of continuing leaves or having a moratorium on leaves?

5. What should be considered of regard to reductions in the administrative ranks? The Task Force recommends a state-sponsored administrative staffing study as a service to boards, superintendents and teacher groups in a time of declining enrollments. This study could provide criteria to determine whether the administrative staff is off balance or not, and to recommend administrative staffing patterns based on district and attendance area enrollment and other factors.

6. Should the district hire more generally trained teachers, that is, those who can teach in several fields or levels?

7. Should the district consider the voluntary transfer of teachers from one field to another where the need for teachers is greater? What are the policies on paying for the retraining of teachers?

8. What processes and practices should the district adopt regarding transferring teachers from a building to be closed or only partially used to other school buildings?

9. What practices should the district follow in keeping the community and staff informed and involved in any planning for reductions in force? What practices should the district follow regarding the involvement of the staff in determining standards to be used in any reductions in force? What is the process of involving staff members and community groups in the analysis of the best available data?

Alternatives to Reduction-in-Force

The following is a list of some alternatives to reducing the number of staff members during a period of declining enrollments. The implementation of some of these alternatives, however, will have the effect of increasing costs. Thus, any discussions of alternatives to reductions-in-force in a period of declining enrollments will normally have to be tied in with a discussion of increases in local taxes, more state aid, or deficit spending.

1. Decrease class size. Although it is generally thought that reducing class size improves the quality of education, the research undertaken so far has not come to any solid conclusions regarding the effects of such reductions.

2. Examine the basis for budgetary cutbacks to determine the priority of teacher salaries and the instructional program relative to such items as administration, maintenance operations and other services.

3. Make every effort to employ teachers who have lost their job due to declining enrollments as substitutes, coordinators, teachers' aides or advisors until attrition allows them to regain their positions.

4. To the extent possible make every effort to channel current staff into positions in new or expanding programs such as early childhood education, vocational education, adult and continuing education, and special education.

5. Provide incentives for early retirement. This issue is discussed in an earlier section of this chapter.

6. When possible, fill the position of a teacher requesting extended leave with a current staff member who would otherwise have been dismissed due to declining enrollments.

THE 60-DAY RULES IN THE SCHOOL CODE

The "60-day rules" in the Illinois School Code need reexamination and perhaps some revision in light of the new conditions of declining enrollments; teacher oversupply in many fields; the need to reduce staff in some districts; and the uncertainty of the amount of state aid until at least the end of the legislative session, and about the rate of inflation and thus costs for the coming year.

To review: the School Code requires that a teacher to be dismissed by the school board must receive written notice from the board at least 60 days before the end of the school term. On the other hand, a teacher need not inform the school board of intention not to return until at least 60 days prior to the beginning of the school term. These rules have the effect of the school board having to inform teachers by the early spring that they cannot return in the fall, knowing that at least some of those non-retained would be rehired when positions open up due to resignations. Many of these resignations may not come in until late June. Thus, substantial periods of uncertainty are created for some teachers and for those responsible for planning the next academic year.

Furthermore, final decisions on the amount of state aid are not made at the state level until at least early July, yet the board is legally required to make major staffing decisions 60 days prior to the end of the school year.

The Task Force on Declining Enrollments recommends that the State Board of Education sponsor a committee of representatives of the major school interest groups in the state to appraise the desirability of maintaining or changing the "60-day rules" in the Illinois School Code as a result of the recent developments of declining enrollments and rapid fiscal and economic flux.

SUMMARY OF RECOMMENDATIONS OF THE TASK FORCE ON DECLINING ENROLLMENTS TO THE STATE BOARD OF EDUCATION, THE ILLINOIS OFFICE OF EDUCATION AND OTHER STATE AGENCIES

1. Students entering or considering state college and university teacher preparation programs should be provided with the best current information on teacher supply and demand.

2. In order to promote high quality programs and teacher supply/demand balance, several studies should be undertaken by the joint committee of the Illinois Board of Education and the Illinois Board of Higher Education.

   a. A study to determine the feasibility and desirability of a requirement that each public teacher training institution submit a five year plan on how it intends to adjust the number of students in its programs to lessen the general oversupply of teachers, or if it does not expect such adjustments, to give the reasons why.

   b. A study of the feasibility and desirability of a five year course of study as a requirement for certification in Illinois.

3. While the Task Force does not support a quota system as a means of controlling supply and demand in teacher education, the Task Force does support the idea that each institution of higher education should be expected to review its own standards of admissions and retention with a view to greater quality control.

4. The Task Force on Declining Enrollments endorses the position of the Board of Trustees of the Illinois Teachers' Retirement System supporting legislation providing for retirement at age 55 or after <u>without discount</u> with 20 or more years of credited service.

5. The Board of Education should sponsor a statewide or several regional study committees to discuss all of the issues surrounding the retraining of teachers.

6. The Board of Education should sponsor a conference, to be planned jointly with university people, school administrators and teachers to bring together with these school groups major public and private employers in the state to assess alternative employment opportunities and the feasibility of a clearinghouse at the state level to help find jobs for teachers.

7. The Office of Education should conduct a study to find out what has happened occupationally to teachers who have left the profession.

8. To aid local districts experiencing declining enrollments in staffing studies, the Illinois Office of Education should provide the following kinds of assistance to local districts as they project their staffing needs--booklets, consultants and training.

9. The Office of Education should examine a representative sample of districts experiencing declining enrollments and disseminate throughout the state the various school board practices and negotiated contract provisions on personnel and the experiences associated with the implementations of these policies.

10. There should be a state-sponsored administrative staff study to provide criteria to determine whether the administrative staff is off balance or not, and to recommend administrative staffing patterns based on district and attendance area enrollment and other factors.

11. Because of the time and cost and the increasing resort to the courts associated with efforts to dismiss a tenured teacher, some vehicle should be developed for due process training for superintendents, board members and teachers. The associations representing these groups should consider conducting such training.

12. The State Board of Education should sponsor a committee representative of the major school interest groups in the state to appraise the desirability of maintaining or changing the "60-day rules" in the Illinois School Code.

CHAPTER V

SURPLUS SPACE/PROGRAM OPPORTUNITIES

INTRODUCTION

With declining enrollments, more space will be available in school facilities. This extra space should be viewed primarily as an opportunity to improve programs and develop new ones. However, when enrollments have decreased substantially, the issue of closing school buildings as an economy move is likely to arise. Facility closing is discussed in chapter three and in parts of chapter two. This chapter, in contrast, deals with program opportunities - both educational and non-educational - in facilities that continue to provide regular public school functions, but that have more space than in the past. However, as in planning for school closure, in planning for program change in a period of declining enrollments, school districts should put considerable emphasis on staff and community involvement. It is often hard to establish new and improved programs and it is helpful in the process of trying to establish such programs to have that involvement of those who will be affected.

Although the basic theme of this chapter is that fewer pupils and surplus space provide opportunities for improved programs as well as new ones in school facilities, fiscal factors must be taken into account, and they may be factors limiting program development. Fiscal resources strongly influence whether declining enrollments will permit reductions in class size. Fiscal constraints and fewer pupils will likely lead to some reductions in courses and programs. There are criteria other than fiscal considerations in making program decisions. They include relevancy, legal requirements, accrediting agency requirements, student demand or interest, teacher availability, school district policies and educational goals, local economic and employment needs, community expectations, and availability of the same subject at a nearby and accessible site. Whether fewer pupils and surplus space lead to program reductions or not, declining enrollments do provide a particularly good setting for a major curriculum review and for a study of staff utilization. (See chapter four for suggestions for a staffing study.)

Interrelated with fiscal and program issues are staffing issues. For example, fiscal constraints, fewer students, and program reductions will lead to staffing reductions.

Because program development as defined in this chapter involves bringing into school facilities public and social service programs - programs not part of the K-12 curriculum traditionally or narrowly defined - there is one additional limiting factor: a traditional attitude of unwillingness to develop shared school/community activities.

The following paragraphs are presented as suggestions for using additional space created by a reduced number of students. The individual suggestions carry no priority. They are organized under the following headings:

A. Regular School Programs
B. Special Needs Programs
C. Alternative Programs
D. Vocational/Career Education
E. Staff Training
F. Programs of other Social and Public Agencies in School Facilities
G. Relations with Higher Education

PROGRAM DEVELOPMENT OPPORTUNITIES

Regular School Programs

Regular school programs should receive first priority! Below are some improvements that could be made if additional space becomes available.

1. Reinstatement of programs previously discontinued or reduced such as art, music or physical education.

2. Elimination of unsatisfactory learning environments, such as an auditorium used as a full time classroom.

3. Enriching the curriculum by providing space to create learning resource centers, large group instruction areas, audio-visual centers, interest areas, learning laboratories areas, and in-school museums.

4. Additional opportunity to implement a regular school program based on optimum time periods for learning rather than maximum use of space, i.e., flexible scheduling, modular scheduling, block scheduling.

5. Providing areas for students' unscheduled time such as student lounges or centers.

6. Elimination of undesirable practices caused by overcrowding such as double shift, extended day scheduling, teachers without a "home base" room.

7. Provisions for adequate office space and meeting rooms for faculty, support staff and volunteer aides.

8. Increased available space will allow for smaller class size which could provide more opportunities to individualized instruction.

Special Needs Programs

Educators have always recognized that there are many students who need instruction which is different than that received in the regular school

program. For example, there is a need to provide special instruction to physically, socially and mentally handicapped students and to the academically talented as well. This instruction requires adequate space.

As additional space becomes available, some of the following programs should be considered by schools to provide for the special needs of students.

1. Corrective or adaptive physical education programs which include physical therapy.

2. Diagnostic evalution programs for special need students including pre-school children.

3. Sheltered workshops for mentally and/or physically handicapped.

4. Early childhood education centers.

5. Seminar programs for academically talented students.

6. Accelerated academic programs -- i.e., advanced science laboratories, research rooms, independent students' areas.

7. Bilingual education programs including orientation of immigrants.

Alternative Programs

School districts should examine the adequacy of newly acquired space for alternative education programs for people of all ages and, also, youngsters who learn in a different manner from regular school pupils. As facilities become available, consideration should be given to the establishment of environments and programs which are intended to respond to students with various learning and motivational problems. Every school district has its dropouts, potential dropouts, unmotivated, unchallenged students. Therefore, creative use of facilities to provide alternative climates for learning should be examined. Fantini[1] indicates that the alternative education movement should find its way into the public school. Old homes and store fronts should no longer be the source for a school district's alternative education program.

Vocational/Career Education

The availability of educational space will provide greater impetus to vocational and career oriented educational programs. Pre-entry survey type vocational programs as well as programs that intensify job entry information and training can be initiated. Some examples are:

1. Career Education resources center for students and teachers desiring information about various vocational or professional job clusters.

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[1]Mario Fantini, "From School Systems to Educational System," Phi Delta Kappan, September, 1975, pp. 10-11.

2. Job acquisition clinics for students seeking assistance in obtaining skills to acquire a job.

3. Training centers for such fields as small appliance repairs, cosmetology, horticulture, plumbing.

4. Job placement centers for students seeking employment.

Classroom teachers assigned to the various vocational and career education programs should utilize specialists from within the community to assist in the instructional phase of these programs.

Staff Training

Contemporary commentary on the state of the art and skill of teaching contains many observations of the need to retrain the professional staff. Creative use of space could facilitate such retraining. However, it should be pointed out that the establishment of district in-service training programs should be designed and constructed in direct response to needs identified by the district's administration and teaching staff.

Space could be converted to new instructional environments while at the same time serving as in-service areas for professional staff. For example, large spaces may be converted to prototype play areas for children incorporating inexpensive and flexible play components, while at the same time teachers could examine the differences in the behavior of children in areas of traditional play compared to the prototype areas.

Consortium efforts could be encouraged and developed to retrain teachers and administrators in the use of technology, in the flexible grouping of students, and also by means of consortia, demonstration centers in every area of instruction could be developed.

Programs of Other Social and Public Agencies in School Facilities

School districts may find that they can now open up their facilities to community and other agencies in an effort to share extra space and thereby develop the school/community concept. Close cooperative relationships with such governmental and social agencies as park districts, mental health departments, law enforcement and criminal justice agencies, senior citizen groups and welfare agencies can be initiated by sharing unused space. These groups can use school facilities for offices, training centers and other purposes. In regard to current state law on leasing public school facilities, see chapter 3. One of the more exciting school/community linkages has been with senior citizen groups and the Department of Aging. More and more senior citizen groups are welcoming the opportunity to use vacant classrooms for special purposes, as well as to engage in the school hot lunch programs. Below is a list of some of the cooperative arrangements that could be established with other social and public agencies.

1. Community Services

   a. Local historical centers
   b. Space for training sessions for local governmental agencies (public works, police, fire).

c. Employment agency counseling centers
d. Cultural centers for art, music and drama
e. Senior citizen activities
f. Governmental offices which provide such services as food stamps, licensing, military recruitment and others
g. Community organization centers, e.g., service clubs, church groups, chamber of commerce, fraternal organizations, etc.
h. Immigrant centers for orienting non-English speaking persons
i. Hot lunch programs for senior citizens
j. Child care centers before and after school, e.g., the latch key program

2. Adult and Continuing Education Services

a. Day-time adult education classes
b. Off-campus university and junior college extension classes
c. Special courses for senior citizens in conjunction with a hot lunch program
d. Parent effectiveness classes during the day and evenings
e. English as a foreign language class

3. Health

a. Health care centers for minority groups or the elderly
b. Training and care centers for first aid
c. Drug abuse centers
d. Field experience centers for medical students specializing in emotional and physical disorders
e. Mental health day care or outpatient centers

Relationships with Higher Education

As enrollments decline and more space becomes available in the elementary and secondary schools, more attention should be focused on the proper role of each type of educational institution. Clearly defined areas of educational responsibility must be established by each community experiencing declining enrollments. The emerging role of community colleges deserves recognition. Although its value as a post secondary school experience should not be downgraded, it should not supplant learning experiences (e.g., adult and continuing education, community education, GED training) which are best accomplished at the secondary school level.

SUMMARY AND RECOMMENDATIONS

This chapter has listed a variety of program opportunities associated with fewer pupils and surplus space for local district consideration. Certainly the listing is not complete. Each district faces a somewhat different combination of program development opportunities - and constraints - in a period of declining enrollments.

The Task Force on Declining Enrollments makes the following recommendations

in regard to school programs:

1. The Illinois Office of Education should establish training programs and provide information which will assist school administrators and teachers in dealing effectively with the management of school programs in a period of decline.

2. The Illinois Office of Education should develop funding sources which would be allocated to mid-range and long-range program planning activities - activities made possible by declining enrollments - in such fields as health education; education of the exceptional child (i.e., gifted children, mentally and physically handicapped); and environmental education in the areas of energy and material resources.

3. All proposed educational requirements placed before the legislature should be evaluated in light of declining public school enrollments.

APPENDIX A

A COMPARISON OF ENROLLMENTS AND ENROLLMENT RATIOS OF ILLINOIS PUBLIC SCHOOLS WITH ILLINOIS NONPUBLIC SCHOOLS*

	Kindergarten		Elementary		Secondary		Total Enrollment	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
65-66								
Public	167,417	90.2	1,343,893	75.7	577,371	83.4	2,083,681	78.7
Nonpublic	18,156	9.8	432,110	24.3	115,182	16.6	565,448	21.3
Total	185,573	100.0	1,776,003	100.0	692,553	100.0	2,654,129	100.0
66-67								
Public	174,663	91.2	1,387,348	76.6	595,861	83.7	2,157,872	79.5
Nonpublic	16,903	8.8	422,723	23.4	115,796	16.3	555,422	20.5
Total	191,566	100.0	1,810,071	100.0	711,657	100.0	2,713,295	100.0
67-68								
Public	173,862	91.8	1,432,739	78.1	608,939	84.5	2,214,540	80.8
Nonpublic	15,478	8.2	400,309	21.9	111,286	15.5	527,073	19.2
Total	189,340	100.0	1,832,048	100.0	720,225	100.0	2,741,613	100.0
68-69								
Public	174,709	92.7	1,464,623	80.6	633,334	85.3	2,272,666	82.7
Nonpublic	13,708	7.3	353,122	19.4	109,537	14.7	476,367	17.3
Total	188,417	100.0	1,817,745	100.0	742,871	100.0	2,749,033	100.0
69-70								
Public	178,031	93.8	1,488,785	81.8	656,198	85.8	2,323,014	83.7
Nonpublic	11,743	6.2	331,260	18.2	108,816	14.2	451,819	16.3
Total	189,774	100.0	1,820,045	100.0	765,014	100.0	2,774,833	100.0
70-71								
Public	181,111	94.2	1,503,021	82.0	668,654	86.4	2,352,786	84.0
Nonpublic	11,250	5.8	330,197	18.0	105,080	13.6	446,527	16.0
Total	192,361	100.0	1,833,218	100.0	773,734	100.0	2,799,313	100.0
71-72								
Public	175,141	94.2	1,503,376	83.0	695,142	87.2	2,373,659	85.0
Nonpublic	10,769	5.8	307,603	17.0	101,783	12.8	420,155	15.0
Total	185,910	100.0	1,811,772	100.0	796,925	100.0	2,793,814	100.0
72-73								
Public	166,790	93.7	1,476,696	83.4	704,035	87.6	2,347,521	85.3
Nonpublic	11,184	6.3	293,652	16.6	99,787	12.4	404,623	14.7
Total	177,994	100.0	1,770,348	100.0	803,822	100.0	2,752,144	100.0
73-74								
Public	162,690	93.5	1,437,796	83.9	711,311	88.0	2,311,797	85.8
Nonpublic	11,334	6.5	275,899	16.1	96,881	12.0	384,114	14.2
Total	174,024	100.0	1,713,695	100.0	808,192	100.0	2,695,911	100.0
74-75								
Public	164,285	92.8	1,398,434	84.2	719,170	88.0	2,281,889	86.0
Nonpublic	12,656	7.2	261,623	15.8	97,923	12.0	372,202	14.0
Total	176,941	100.0	1,660,057	100.0	817,093	100.0	2,654,091	100.0

*The public and nonpublic school enrollments shown above were provided by the Statistics Section of the Illinois Office of Education and were taken from the annual Fall Pupil Enrollment and Teacher Statistics publication for Illinois Public Schools and Independent, Parochial, and Private Schools, respectively. Prior to 1971-72, the reporting of enrollments by nonpublic schools were somewhat incomplete. Since 1971-72, followup contacts have been employed in an attempt to obtain complete reporting of enrollment from all known or "recognized" independent, private, and parochial schools.

APPENDIX B

EXPLANATION OF THE METHODS USED IN DEVELOPING PROJECTIONS OF ILLINOIS PUBLIC SCHOOL ENROLLMENT, 1975-76 - 1985-86

Prior to developing ten-year (1975-76 through 1985-86) projections of Illinois public school enrollment, it was first necessary to project the number of Illinois live births for the years 1975 through 1980. Three models of live birth projections for Illinois were presented in Table II and discussed on page 5 in Chapter I.

The total number of accumulated live births eligible for enrollment in Illinois kindergarten, elementary (grades 1-8), and secondary public schools are shown in Table I, Appendix B, for each of the projection models. The constant model of Illinois live birth projections is used in the development of Illinois public school enrollment projections in this report. This model assumes a constant annual rate of 68.5 live births per 1,000 females (ages 15-44) from 1975 through 1980.

This constant rate is assumed because of the many uncertainties regarding the prediction of future birth rates and the lack of sufficient evidence to justify assuming either an increase or decline in future live birth rates. In addition, the assumption of a constant future birth rate will result in a gradual increase in the number of projected live births which directly reflect the annually increasing number of women in the child-bearing age (15-44 years). Deviations in the actual number of future live births from the projections in this report will also reveal the direction and magnitude of the effects of changes in economic conditions, social conditions, and personal attitudes affecting family size.

Two general approaches were implemented in formulating projections of Illinois public school kindergarten, elementary, and secondary enrollments. They are (1) Cohort Survival Ratio models and (2) Statistical Correlational-Regression models. Cohort Survival ratios are the percentage or proportion of Illinois live births that actually enroll in Illinois public schools 5-17 years later. Survival ratios for Illinois public kindergarten, elementary (grades 1-8), and high school enrollments are shown in Table II, Appendix B, for the school years 1962-63 through 1974-75.

Statistical Correlational-Regression models are mathematical equations used to predict future enrollments based upon the relationship between past enrollments and previous live births. Approximately 250 different Correlational-Regression models and 12 Cohort Survival Ratio models utilizing different time periods were tried in an attempt to identify the "best" model(s) for projecting enrollments. [1]

Table IV on page 10 in Chapter 1 presents statewide projections for Illinois public kindergarten, elementary and high school enrollments for the years 1975-76 through 1985-86. The projected kindergarten enrollments assume a survival ratio of .835 for the 1975-76 school year and a constant survival ratio of .830 for the rest of the ten-year period. The elementary (grades 1-8) enrollment projections are based upon a bivariate linear regression equation utilizing enrollment data from the most recent four-year period -- 1971-72 through 1974-75. (The equation used was $Y = a + bX$; where Y is the projected elementary enrollment, X is the number of live births, a equals -56,468, and b equals .850627.) The high school enrollment projections were obtained by using a four-year average survival ratio (.759945) for the same four-year period (1971-72 through 1974-75).

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[1] The criteria used in evaluating the results of these different models were the Standard Deviation of Cohort Survival Ratio models, the standard error of estimate and R^2 value of Correlational-Regression models, and the extent to which the projected enrollments of all models were consistent with a continuation of current trends of in- and out-of-state migration, dropout rates, and public/non-public enrollment ratios.

TABLE I, APPENDIX B

THREE PROJECTION MODELS OF ACCUMULATED LIVE BIRTHS ELIGIBLE FOR ENTRY INTO ILLINOIS PUBLIC SCHOOLS*

School Year	Live Births Eligible for Kindergarten Enrollment			Live Births Eligible for Elementary Enrollment			Live Births Eligible for High School Enrollment
1975-76	205,203	205,203	205,203	1,671,481	1,671,481	1,671,481	950,394
1976-77	195,311	195,311	195,311	1,646,200	1,646,200	1,646,200	946,166
1977-78	177,848	177,848	177,848	1,616,724	1,616,724	1,616,724	931,082
1978-79	168,992	168,992	168,992	1,572,313	1,572,313	1,572,313	914,581
1979-80	168,991	168,991	168,991	1,533,242	1,533,242	1,533,242	885,593
1980-81	171,600	171,600	171,600	1,500,949	1,500,949	1,500,949	856,393
1981-82	174,000	175,000	176,000	1,476,905	1,476,905	1,476,905	827,250
1982-83	176,400	178,400	180,500	1,457,644	1,458,644	1,459,644	798,252
1983-84	178,700	181,900	185,000	1,438,345	1,441,345	1,444,445	785,888
1984-85	181,000	185,300	189,600	1,411,842	1,418,042	1,424,242	789,807
1985-86	183,200	188,700	194,200	1,397,531	1,408,031	1,418,531	789,474
1986-87				1,402,883	1,418,883	1,434,883	774,061
1987-88	Model I	Model II	Model III	Model I	Model II	Model III	747,354
1988-89							711,142
1989-90							687,431

* All three sets of projected live births assume a live birth rate of 68.5 per 1,000 females (ages 15-44 years) for 1975. For the years 1976 through 1980, Model I assumes a drop in the birth rate of 0.4 per year, Model II assumes a constant rate of 68.5, and Model III assumes an increasing rate of 0.4 per year. All figures entered above the lines are actual live births while those entered below the lines are projected live births. The three models were developed by Clyde Bridger, Chief Statistician, Illinois Department of Public Health, State Center for Health Statistics, Springfield, Illinois.

TABLE II, APPENDIX B

NUMBER OF ILLINOIS RESIDENT LIVE BIRTHS AND
CORRESPONDING ILLINOIS PUBLIC SCHOOL ENROLLMENT

School Year	Kindergarten			Elementary (1-8)			High School		
	Live Births	Enrollment	Survival Ratio	Live Births	Enrollment	Survival Ratio	Live Births	Enrollment	Survival Ratio
1962-63	238,579	153,836	.645	1,659,627	1,237,940	.746	694,408	497,881	.717
1963-64	234,712	155,306	.662	1,708,893	1,266,645	.741	745,015	558,662	.750
1964-65	239,871	161,618	.673	1,753,965	1,310,409	.747	759,831	570,377	.751
1965-66	238,760	167,417	.701	1,792,754	1,343,893	.750	764,906	577,371	.755
1966-67	237,051	174,663	.737	1,826,076	1,387,348	.760	785,473	595,861	.759
1967-68	230,484	173,862	.754	1,856,214	1,431,739	.771	802,973	608,939	.758
1968-69	224,787	174,709	.777	1,869,569	1,464,623	.783	830,562	633,334	.763
1969-70	222,259	178,031	.801	1,873,815	1,488,785	.795	850,021	656,198	.772
1970-71	208,063	181,111	.870	1,866,503	1,503,021	.805	874,154	668,654	.765
1971-72	201,284	175,141	.870	1,835,987	1,503,376	.819	905,920	695,142	.767
1972-73	195,644	166,790	.853	1,802,559	1,476,696	.819	923,403	704,035	.762
1973-74	193,261	162,690	.842	1,758,332	1,437,796	.818	942,733	711,311	.755
1974-75	195,699	164,285	.839	1,712,833	1,398,434	.816	951,922	719,170	.755
1975-76	205,203	_____	____	1,671,481	_____	____	950,394	_____	____
1976-77	195,311	_____	____	1,646,200	_____	____	946,166	_____	____
1977-78	177,848	_____	____	1,616,724	_____	____	931,082	_____	____
1978-79	168,992	_____	____	1,572,313	_____	____	914,581	_____	____
1979-80	168,991	_____	____	1,533,242	_____	____	885,593	_____	____
1980-81	_____	_____	____	1,500,949	_____	____	856,393	_____	____
1981-82	_____	_____	____	1,476,905	_____	____	827,250	_____	____
1982-83	_____	_____	____	_____	_____	____	798,252	_____	____
1983-84	_____	_____	____	_____	_____	____	785,888	_____	____
1984-85	_____	_____	____	_____	_____	____	789,807	_____	____
1985-86	_____	_____	____	_____	_____	____	789,474	_____	____

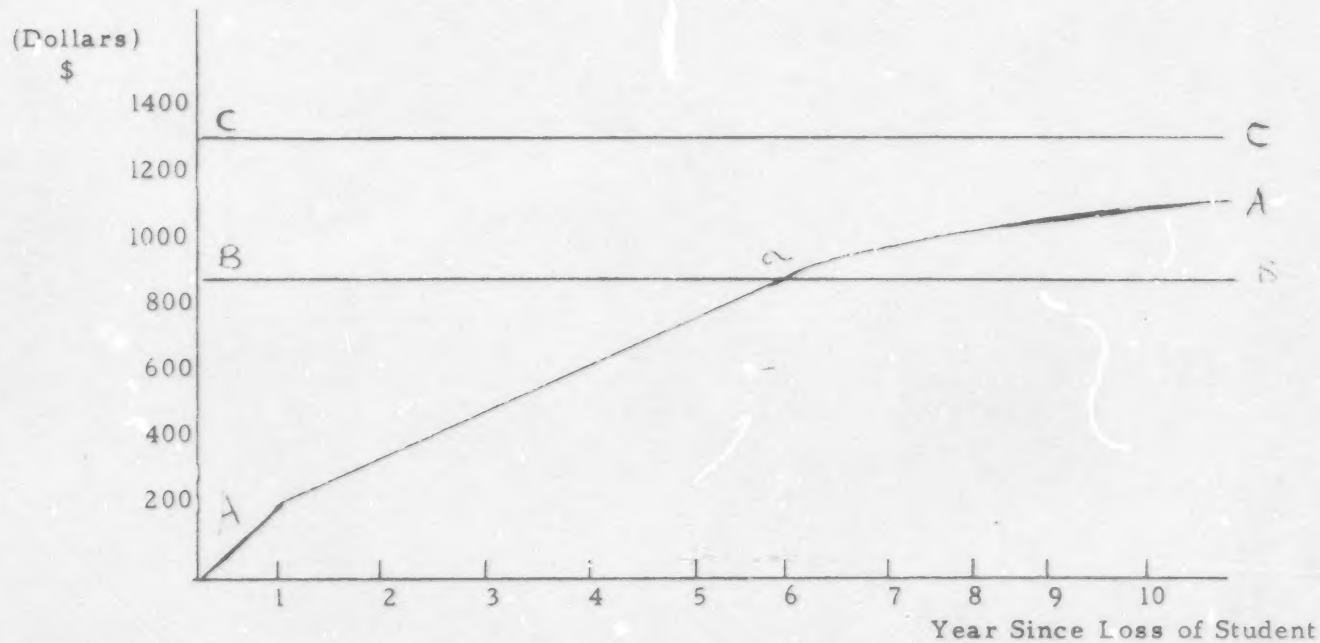
APPENDIX C

ILLUSTRATION OF FINANCIAL PROBLEMS CREATED DUE TO THE DIFFERENCE IN THE RESPONSE OF REVENUES AND EXPENDITURES TO DECLINING ENROLLMENTS

The financial problem created due to the difference in the response of revenue and expenditures to declining enrollment was illustrated numerically on page 34 in Chapter 2. The dilemma is presented schematically in Figure I, Appendix C. Line A shows over time the hypothesized relationship between the reduction in total expenditure attributed to the loss of a student. Line B is the hypothesized relationship showing the reduction in the general state aid and the loss of the pupil. Line C represents the total expenditure per pupil at the time of the loss of the pupil. This static model portrays the excess burden created by the varying response of revenue and expenditure for the loss of one pupil - that loss being pictured over a period of years. The difference in lines A and B at any point in time represents the excess burden. The values of lines A and B are equal at point a. Beyond point a the reduction in total expenditure due to the loss of the student is greater than the loss of state aid. Notice that it is the sixth year after the enrollment decrease that the lines intercept. Line A approaches C but it is hypothesized that A will not intersect at any point with C. The full expenditure is never quite regained due to long-term capital investments and retirement contributions.

FIGURE I, APPENDIX C

GRAPHIC ILLUSTRATION OF DISTRICT FINANCIAL PROBLEM



It should also be clearly understood that poor districts (i.e., those with low assessed valuations per student) are more heavily dependent upon the state for revenues. The decline in state aid in response to enrollment decreases will have a greater impact upon such districts. Therefore, those districts least able to make adjustments due to revenue losses will be the districts hardest hit by the financial impact of declining enrollments. With reference to the above figure, assuming the same cost structure, for poor districts Line B would shift upward. The excess burden created by declining enrollment would be greater and the point in time when the decrease in expenditures would equal the decrease in revenues would be further in the future.

APPENDIX D

COMPARATIVE RETIREMENT BENEFITS - 1974
EFFECTIVE AT AGE 60 AND AGE 55 WITHOUT DISCOUNT*

Case No.	Retirement Age	Average Salary	Annual Allowance	Total Value To Age 73
1	60	$11,166.91	$ 5,276.40	$ 68,593.20
	55 - No discount	7,657.75	2,814.22	50,655.96
2	60	18,042.49	13,531.92	175,914.96
	55 - No discount	12,200.00	8,180.10	147,241.80
3	60	11,565.76	5,459.76	70,976.88
	55 - No discount	7,837.25	2,877.39	51,793.02
4	60	12,358.13	6,486.36	84,322.68
	55 - No discount	7,715.00	3,239.33	58,307.94
5	60	12,147.75	7,731.84	100,513.92
	55 - No discount	8,188.00	4,302.31	77,441.58
6	60	10,579.00	6,194.88	80,533.44
	55 - No discount	7,771.03	3,722.07	66,997.26

* Source: Board of Trustees of the Teachers' Retirement System of Illinois

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